SurfAid Version 2 User's Guide

SurfAid Version 2 User's Guide

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Section 1. What's new in Version 2.2.3

Analysis Interface Enhancements

This list of Standard Features is packaged with the newly released offering without custom installation or configuration and without additional costs.

Billable Traffic Volume Report

SurfAid has added a new report to the menu of Standard Reports to help easily reference the number of billable traffic volumes for any month. This report is accessed via the "Traffic Volume Review" folder under the Standard Reports menu. Under this folder, additional folders will be created by YYYY-MM to contain the billing data for that period.

For each period two reports are created:

- **Prior Month Review**
  Contains the following,
  - Total RQs for the previous month

- **Quarterly Review**
  Contains the following,
  - Top 7 Days in Last Month (Used when less than 30 days are available in the last quarter when applicable)
  - Top 14 Days in Last Quarter (Used when 30-89 days are available in the previous quarter when applicable)
  - Top 21 Days in Last Quarter (Used when all days are available in that period when applicable)

Note: *RQs refer to each customer's web visitor activity records ("hits") that are processed and stored at the customer's request in their SurfAid Webmart. RQs do not include image files (.gif and .jpg) and java applets (.js) unless otherwise requested by Customer.*

Graphing GUI for Data Analysis

The Data Analysis interface has been enhanced to give users the capability to create on-demand graphs and charts. These graphs and charts can be viewed and modified via the Charts tab on the Data panel. A series of pull-down menus, advanced options, and right click choices will give the user the ability to further customize each report with virtually instant results. For more detailed information on this functionality, see Chapter 7, Analyzing Your Web Site Data with Graphs.

Correlate Visits that Viewed Similar Pages

The Pathing interface has been enhanced to give users the added capability of correlating visit behavior during visits. By specifying two or more pages, users can now see the total number of visits that visited all or part of that list of pages in the their visit. These reports can be accessed by clicking on the tab just to left on the Pathing Interface. Also, please notice there is a Help Menu available within the interface. See Section 7, Page Correlation for more information.

Section 2. Downloadable Files

You can download a PDF version of the SurfAid User's Guide or an HTML version.

Click here for the PDF version.

Click here for the HTML version.

Also available are a downloadable file for new users and a quick reference guide for existing users.

Click here for the Introduction to SurfAid User's Guide for new users.

Click here for the Quick Reference Guide for existing users.

Click here for a PDF version of the Training Manual that contains different training scenarios for both new and existing users. Click here for a word version of the Training Manual.

Section 3. FAQ's

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Performing Category Administration

You can perform administrative tasks using Category Editor if your SurfAid username has administrative authority. From the Main Page, click on the "Category Editor" link

A new browser window will be launched for you. For more information on performing various kinds of administration, refer to Accessing the Category Editor in Section 10.

Performing Security Administration

You can perform administrative tasks using the Category Editor if your SurfAid username has administrative authority. The left pane of the Main Page will have a link for the Category Editor. From the Main Page, click on the "Security Admin" link

A new browser window will automatically be launched. For more information on performing Security administration, refer to Accessing the Security Administration in Section 9.

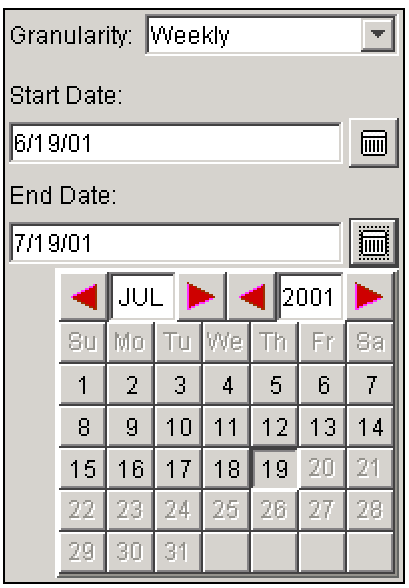
Changing The Date Range On The Data Analysis Pane

Changing the date range on the "Data Analysis" pane can help you narrow down the results by providing a "granularity" option. This option allows you to group your data into the following categories:

- Overall
- Daily
- Weekly
- Monthly

You also can change the start and end dates you wish to view. To change the start and end date ranges for data selection:

1. Click on the  button
2. Click on the desired date from within the calender.



Running Custom Reports

Data Analysis is an interface that is provided to help you get a more in-depth understanding beyond what is available in Standard Reports. Performing an in-depth analysis will allow you to slice and dice the data across custom defined date ranges within an easy-to-use point-and-click environment. In the left Pane, click on the Data Analysis link. For more information, visit Section 7, Analyzing Your Web Site's Data.

Previously Viewed Page Analysis

Performing a previously viewed page analysis allows you to either find the most popular previous or subsequently viewed page from any desired URL resource. To view pages before a specific resource:

1. From the Main Page, click on "Data Analysis"
2. From the "Area of Analysis" tab, click on Previously Viewed Resources in the left pane
3. Click on the "Filter" tab
4. Choose "Content Category" from the pull down menu
5. Choose the particular resource in which you are interested in finding the previously viewed pages for
6. Select your desired date range from the "Date" tab
7. Select Page Views as your measurment from the "Measurement" tab
8. Click on the "Update" button

To view pages after a specific resource:

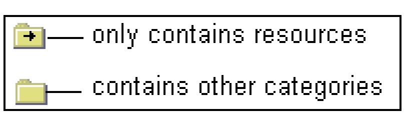
1. From the Main Page, click on "Data Analysis"
2. Click on Previously Viewed Resources in the left pane
3. Click on the "Filter" tab
4. Choose "Content Category" from the pull down menu
5. Choose the particular resource
6. Click on the "Update" button

Drilling Down To See Resources

Once you analyzed your categorized data and have your results displayed in the Data pane, you can drill down to get URL resources. To drill down to see URL resources:

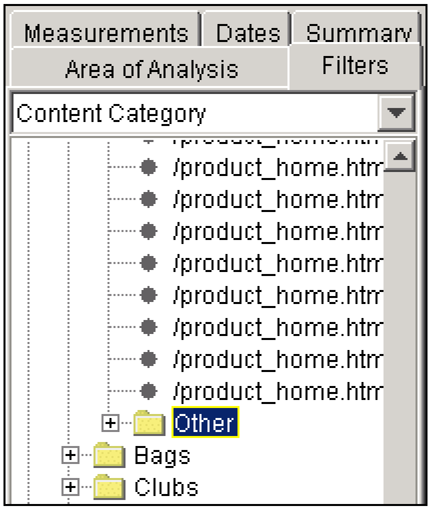
1. Double click on the category folder (or click on the "+" sign next to the folder)
2. Double click on the folder imbedded inside

Note: *You can distinguish between a category that contains resources or a category that contains other categories. A category with only resources will have in arrow in the folder icon and a category with other categories will not have anything in the folder icon.*



You will see resources that were contained within folder. If you see an "Other" category at the end of the list, there are additional resources that can be displayed. To see more resources or change the maximum number of returned resources, you can do the following:

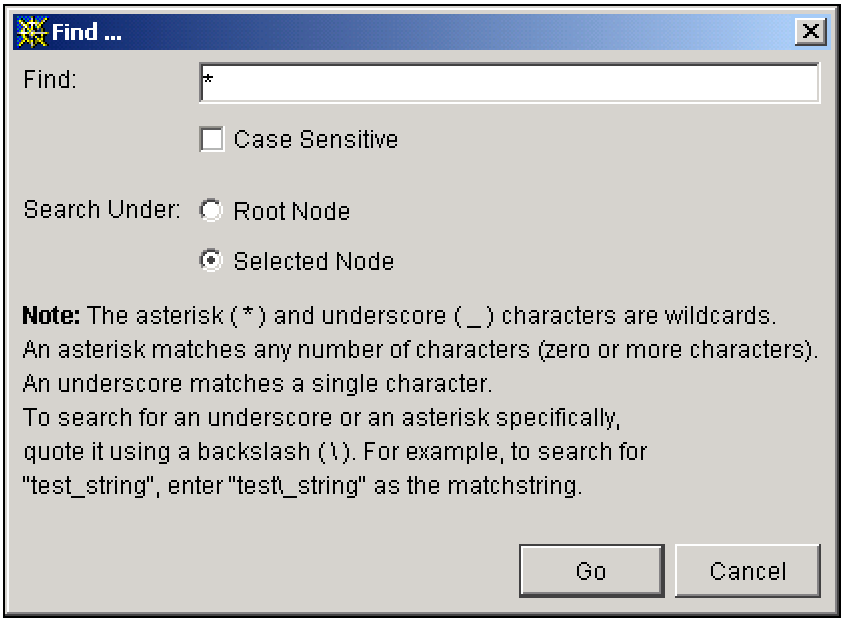
1. Double click on the "Other" folder
2. Change your preferences to the desired maximum number of returned resources
   - see Section 5, Changing Your Preferences



Finding A Specific Resource I Am Looking For

Once you have displayed some resource categories in the Data pane, you can find specific resources by URL. To find a specific resource:

1. From the Control pane, click on the Filters tab
2. Click on the "Tools" pull-down menu and select "Control Panel"
3. Select "Find"

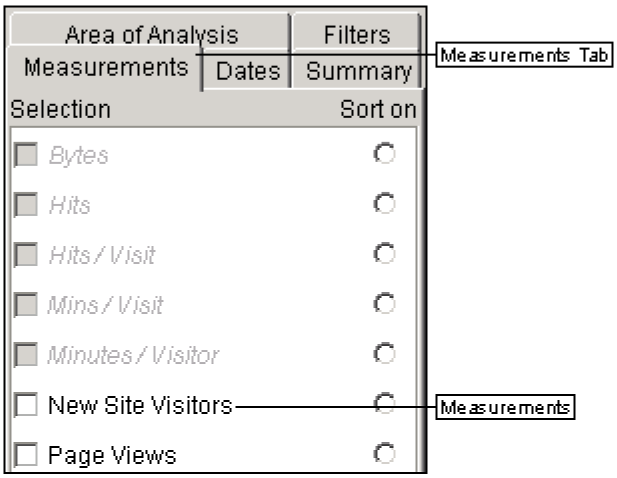


4. Type in the URL you are looking for in the input area
5. Click on either "Root Node" (highest category) or "Selected Node" (category). If you have not selected a category you will not be able to choose "Selected Node"
6. Click on the "Go" button
7. Click on the "Update" button

Indicating What Measurements I Want Displayed

Once you have set your area of measurement and any filters, you can select the measurements you would like displayed in the Data pane. To indicate what measurements you want displayed:

1. From the Control pane, click on the "Measurements" tab



2. Choose one or more measurements listed in the "Selection" column
3. Select the measurement on which you want a sort performed

Selecting How I Want The Data Aggregated

You can choose how your data is grouped within date ranges. To select how you want the data aggregated:

1. Click on the drop down box in the top left corner
2. Click on one of the following:
   - "Daily"
   - "Weekly"
   - "Monthly"
   - "Overall"
3. Click on the "Update" button

Showing Percentages As Well As Values

Showing percentages as well as values is helpful for comparing your data. To show both percentages and values:

1. From the Control pane, click on the "Measurements" tab
2. Check the "Show Percentages" box
3. Click on the "Update" button

Sorting The Values In The Data Pane

Sorting the values in the Data Pane is helpful for you are viewing specific measurements. To sort the values in the

Data Pane:

1. From the Control pane, click on the "Measurements" tab
2. Click on the desired measurement to sort
3. Click on the "Update" button

Viewing The Data In Categories

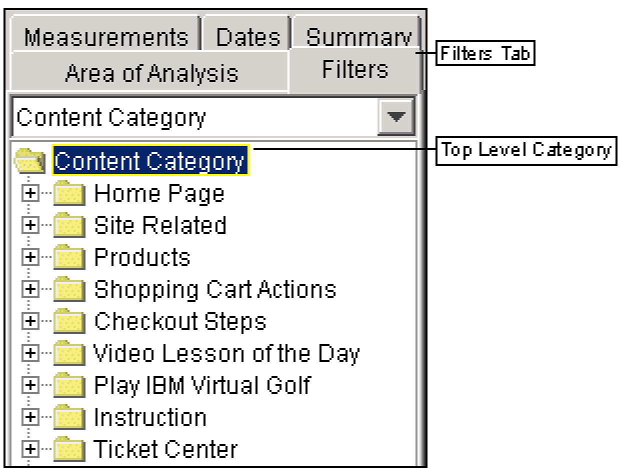
Viewing the data in categories will make it easier to view the specific data you are comparing. To view the data in categories:

1. From the Main Page, click on "Data Analysis"
2. Follow the instructions in Analyzing your Web Traffic and Using a Boolean search string to narrow your data in Section 8.

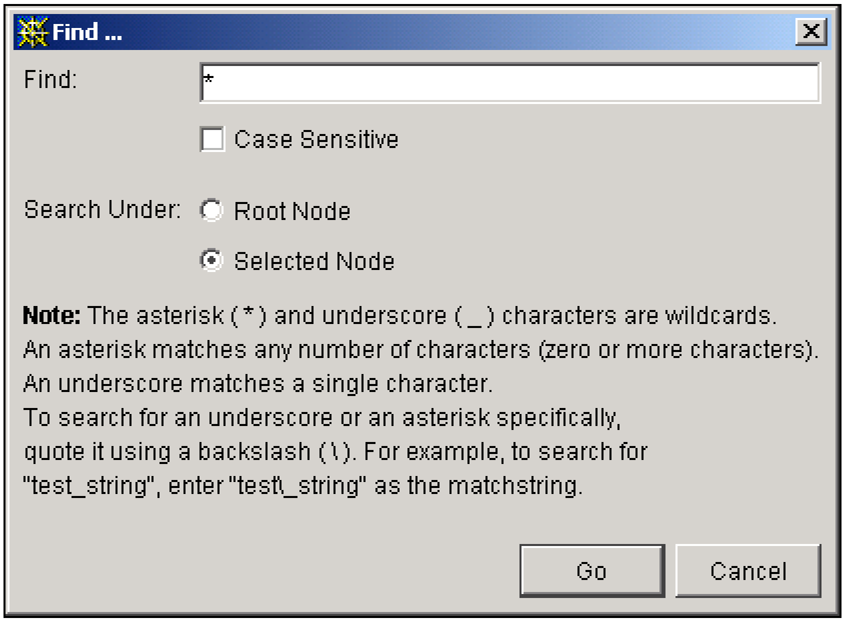
Viewing The Data Uncategorized

Viewing the data uncategorized may be necessary if you have not yet decided how you want to categorize the data. To view the data uncategorized:

1. Select the appropriate "Area of Analysis" and "Measurements"
2. Click on the "Filters" tab
3. Select the top level category



4. Click on the "Tools" pull-down menu
5. Select Control pane
6. Select "Find"

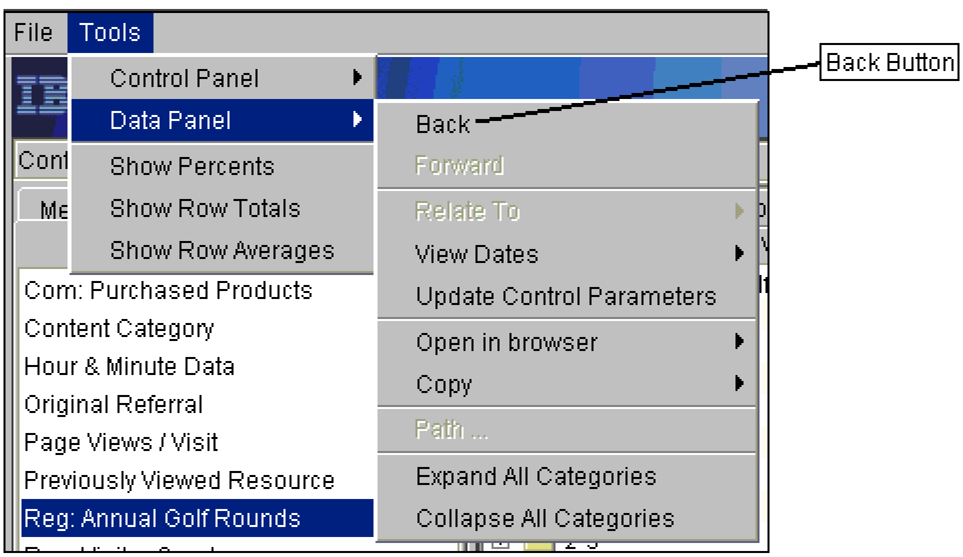


7. Click on the "Go" button
8. Click on the "Update" button

Moving Back and Forward Between Reports

You can move back and forth between reports you run. To do this,

1. Click on the "Tools" button at the top of the screen
2. Select "Data Panel" from the drop-down menu
3. Click on the "Back" button

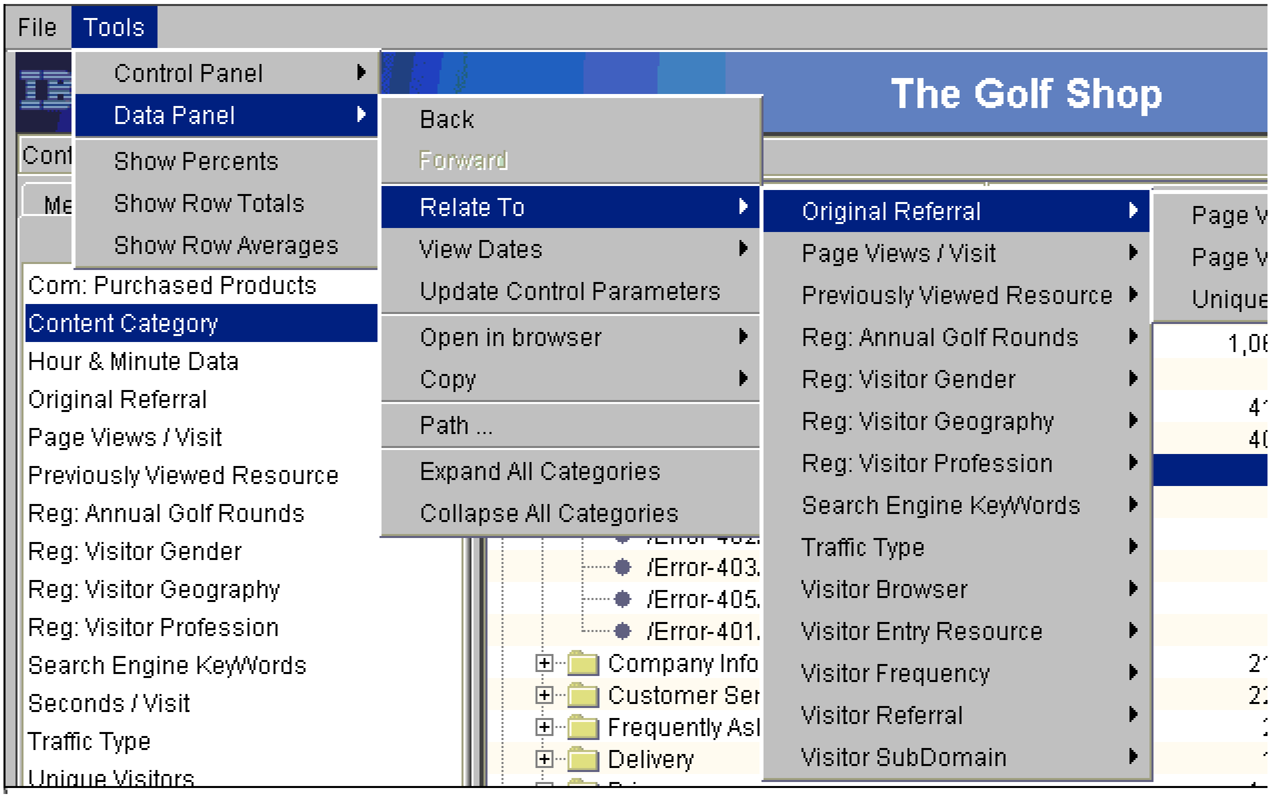


Finding Web Site Relationships

You can use the "Relate To" menu to relate the selected data to other data in the Web Site. To do this,

1. Click on the "Tools" button at the top of the screen
2. Select "Data Panel" from the drop-down menu

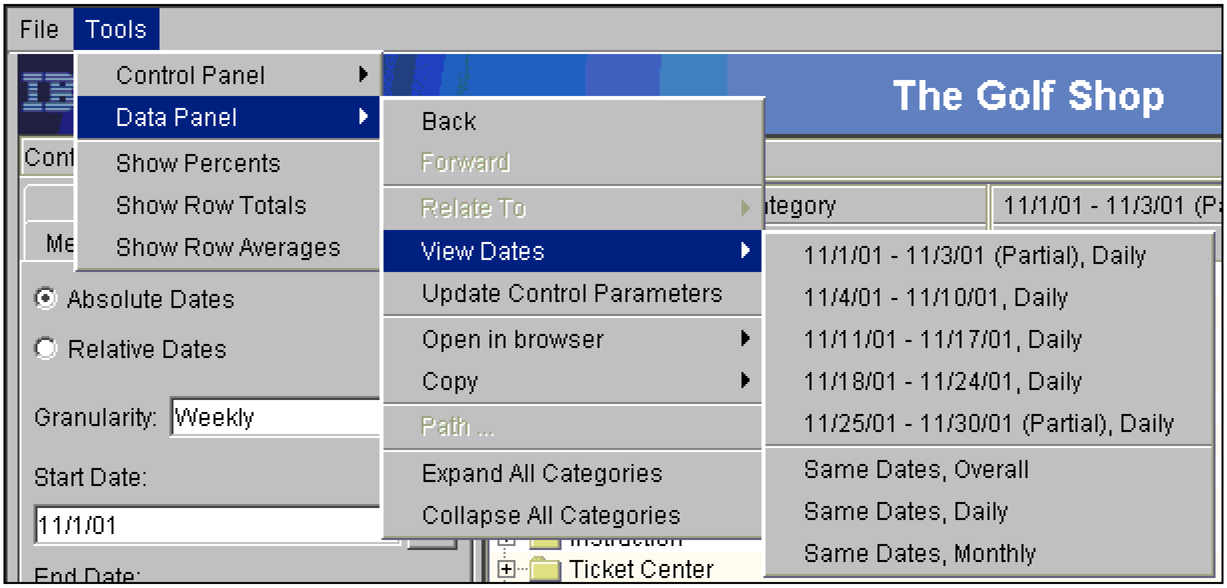
3. Select "Relate to"
4. Click on the desired data category you want to relate your data to
5. Select the measurement you want to use for your selection



Drilling In On Specific Dates

The "View Dates" feature allows the user to run a report with the same parameters as the current report, but with the selected date range. To run a report,

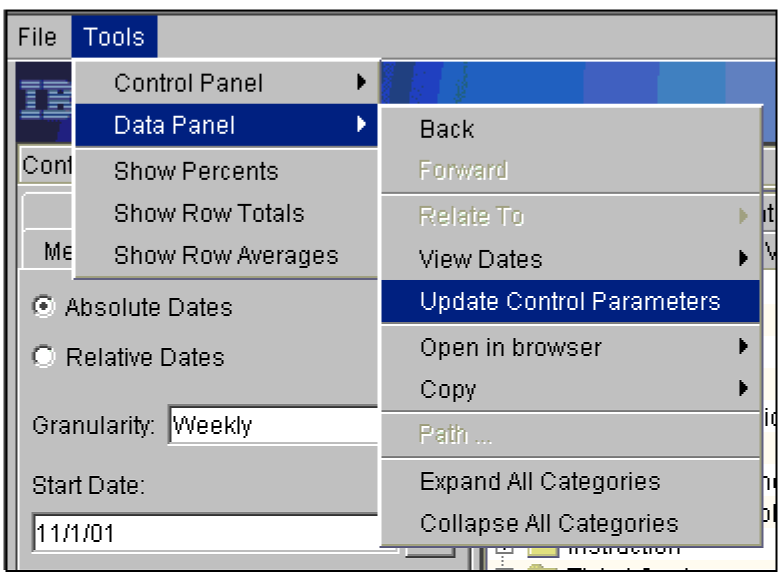
1. Click on the "Tools" button at the top of the screen
2. Select "Data Panel" from the drop-down menu
3. Select "View Dates"
4. Select the date measurement you want to view



Updating Control Parameters

The "Updating Control Parameter" feature allows the user to set the control panel parameters to match those for the current report in the data panel. This includes any selected categories or resources as filters in the current area of analysis. If you do not wish any filters to be set in the current area of analysis, select the top level category (should have the same name as the area of analysis) in the data table. To update the control parameters,

1. Click on the "Tools" button at the top of the screen
2. Select "Data Panel" from the drop-down menu
3. Select "Update Control Parameters"



Clearing All Of The Filters

If you are making up multiple filters for a complex analysis, it is helpful to reset the existing filters and start from scratch. To clear all of the filters:

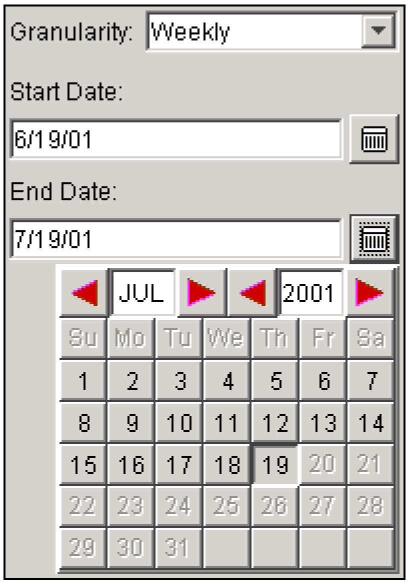
1. Click on the "Filters" tab
2. Click on the "Control" pane

3. Click on "Clear All Filters"

Viewing The Filters I Have Set So Far

You may want to view the filters you have already set before adding new filters. To view the filters you have set so far:

1. Click on the Control pane
2. Click on the "Summary" tab



Setting Complex Filters

Once you have set your area of analysis and have selected a filter, you can select more filters. To set complex filters:

1. Click on the "Filter" drop down list
2. Choose a different "Filter" category

Changing The Column Size

Changing the column size will allow you to view more or less columns at once, depending on your specific needs. To change the column size:

1. In the column header area, left click on a column separator and hold the button down
2. Move the mouse left or right to change the column width
3. Release the button when you have the width set

Moving Columns Around

Moving columns around will allow you to easily compare specific data by placing them beside each other. To move columns around:

1. Left mouse click and hold the button down on the column you wish to move
2. Drag the column to the new location
3. Release the left mouse button

Sizing The Panes

Sizing the panes will allow you to customize the panes to suit your needs. To size the panes:

1. Left mouse click and hold the button down on the appropriate separator line
2. Move either left/right or up/down until the pane is the correct size
3. Release the left mouse button

Viewing Exported Reports

You can view exported reports as well standard reports. To view exported reports:

1. From the Main Page, click on "Exported Reports"
2. Click on the report you wish to view

Viewing Hourly Traffic

Viewing hourly traffic will give you information on what type of people are viewing your page. To view hourly traffic:

1. From the Main Page, click on "Data Analysis"
2. In the Control pane, click on the "Area of Analysis" tab
3. Select "Hour & Minute Data"
4. In the Control pane, click on the "Measurements" tab
5. Click on the measurement you are looking for
6. Click on the "Update" button

Viewing Standard Reports

To view standard reports:

1. From the Main Page, click on Standard Reports
2. Click on the report you wish to view

Using the Customer Administration Facility

The Customer Administration Facility shows your current SurfAid settings. You can find information such as:

- filtered user IP addresses
- filtered files
- saved report parameters
- processed log files
- session types

This new feature allows you to administer these SurfAid options and save them in an account. For more information, go to Accessing the Security Administration Section 9.

Using the Message Board

The SurfAid message board serves as a communication tool for you and consultants to interact using a web interface. You can visit the message board to view announcements posted by SurfAid consultants.

Section 4 Glossary

A B C D E F G H I J L M N O P Q R S T U V W

A

area of analysis
The area in the interface to the right where most of the administration takes place.

authenticated user
A count of the number of unique visit sessions made by unique registered users. SurfAid can report on the top authenticated users who visit your site.

B

background

The task or program that runs concurrently with another task, but is not the active task.

browser
The Internet access method used by a site's visitor (i.e. Netscape).

bytes
A measure of the amount of information transferred by the web site's servers, normally equal to a single character. Serves as an indicator of the amount of network bandwidth consumed during transfers.

C

case sensitive

A recognized difference between capital and lower case letters.

category editor

The editor that allows you to manage the way SurfAid presents orginized data.

comma delimited file
A format in which each value in a file is separated by a comma (W, X, Y, Z).

content category
A layout that sorts groups of information by content. This is determined by categorizing page resources within the page URLs.

cookie
A file on a PC containing saved information usually set by an Internet browser. It is used to identify users.

D

data mining
The process of scanning data to find specific pieces of information.

DNS
(Domain Name Server) It is used to resolve Internet Protocol (IP) addresses to domain names.

domain
Used to identify an Internet site. It represents the Internet source of the web site's visitor (i.e. www.ibm.com where "ibm.com" is considered the domain).

drill down
Used to reveal fine details of data by examining small amounts of information.

E

e-business

A business that is driving revenue from something electronic, usually on the Internet.

F

filter

A method of screening data to examine specific information.

first time visitor
A user visiting the site for the first time ever with a unique cookie.

G

gif

(graphics image file) A file extension for a graphics file (i.e. imagefile.gif).

granularity
The size of the units of code or the level of detail that code is considered.

group
A group is made up of users with access to the same data. Groups can be added, modified and removed using the Security Admin GUI. The following settings are defined for each group

GUI
(Graphical User Interface) Interface for the user to interact with the computer through the use of graphical cues like screen images that include windows, icons, etc.

H

hit
A browser request from a server for any one item. This includes pages, graphic images, redirects, frames, and other resources.

hits per visit
The average number of hits per unique visit over the selected time period.

hour & minute data
Shows a distribution by hour and minute over the selected time period.

I

imputed hits

A hit calculated from the parameter tags in a one pixel gif record. It serves as a substitute to full web server log records.

J

java

An object-oriented programming language that is specifically designed for writing programs that can be safely downloaded through the Internet. Small Java programs are called applets and include functions.

L

LAN

(Local Area Network) A network that connects computers in a small pre-determined area like one room. LAN's can also be connected to each other via telephone lines and radio waves.

look and feel
The environmental settings and format of a web page. This refers to the fonts, colors, icons, etc.

M

matchstring

The template used to match text strings against URLs.

N

Net commerce

An IBM product that provides commercial or retail application on the Internet.

O

object
A URL resource or a computed value. They are found during matchstrin analysis.

original referral

P

The web site that first linked your visitor to your web site.

pages per visit
The average number of page views per unique visit.

page views
The number of times a page was viewed.

page views per visit page
The average number of pages viewed per unique visit over the selected time period.

page views per visitor
The average number of page views by each visitor on your web site over the selected time period.

pixel
A picture element. It is the smallest unit that can be presented to the user or the smallest graphic element that can be transferred.

platforms
The operating system used by a site's visitors (i.e. Windows or Mac OS).

port
The place that information goes into and/or out of a computer. On the Internet, port often refers to a number that is part of a URL. It also refers to translating a piece of software to bring it from one type of computer system to another.

portal
A web site that serves as a starting point to other destinations or activities on the web.

previously viewed resource
A count of all internal or external pages that directly linked visitors to your site or resource.

proxy
A technique used to cache information on a web server and acts as an intermediary between a web client an that web server. It holds the most commonly and recently used content from the web for users in order to provide quicker access and to increase server Security.

Q

queries

A word or group of words used in connection with a search engine or database to find a particular file, web site, or set of records in a database.

R

relational data warehouse
The underlying relational database used by SurfAid.

repeat visit
The number of visits across the selected time period that were not first time visits.

repeat visitor
A visitor who has been to your web site at least once before.

resource
The URLs that Surfaid counts and stores.

roles
A user's role specifies what functionality the user is allowed to access. The available roles are

---

S

search engine keywords

A report of the top keyword searches and search engines that bring visitors to your web site. They are generated by search parameters stored in the referring URL strings of the major engines.

seconds per page views
Represents the average amount of time users spend on one page.

seconds per visit
The average amount of time users spend on your site per visit session.

secure viewing connection
A technology that provides privacy, integrity, and authentication in point-to-point communications (i.e. the connection on the Internet between a web browser and a web server).

Security

The account name of a SurfAid user.

singleton
A retail application describing the purchase of one and only one product.

spider/robot metrics
Simulates a user to calculate the amount of traffic generated on your web site by known non-human activity such as artificial intelligence (i.e. a program that searchs web sites for content). They can be filtere form valid traffic views.

spin
Describes a set of data with a new area of analysis.

T

traffic type

A category layout that separates all recorded site visits into meaningful groupings. This allows you to determine the number of page views, errors, redirects, frames, images, etc. that are made to your web site. This is also known as data analysis.

U

unique visitor
A count of the number of individual visitors to your site over the selected time period. SurfAid calculates this by counting the number of unique cookies in your logs.

unique visitor by content category
Measurement calculated by the count of visitors to a category after being presented with page views associated with that content category. This is also known as usage clustering.

URL
(Universal Record Locator) designates web page location.

usage analysis tool
Records and displays information about user access to a particular service.

user
A user is identified by a distinct Security. This Security, along with a password, allows a user to log onto the SurfAid system. This Security is associated with a database and a role and group (discussed below) for the database. Note that some users can have access to multiple databases, and each database a user has access to can be associated with a different role and group.

V

visit

Represents the number of unique sessions to your web site. It is recreated by finding common relationships between hits in the web log. Each of the three types of visits account for a 30 minute timeout (i.e. a visit that did not complete because of high internet trafic)

- standard: Looks for common IP addresses and User Agent string combinations to recreate a user visit.

- standard + referral: Looks for a third common piece to identify a unique visit session. (IP address, user Agent String and Visitor Referr
- unique identifiers: Scans the web logs to recreate visit sessio

visitor domain
The Internet address of the user's computer used to access your site. This address is called an IP address or Internet Protocol address (i.e. 129.120.209.31). This number address is interpreted by DNS as text-like address (i.e. www.unt.edu)

visitor entry resources
Represents the first pages of your web site where a new visit session began.

visitor exit page
The point on your site where a visit session ended. It is the last page viewed before a visitor leaves your site.

visitor frequency
A report showing the different types of visitors-new visitors, repeat visitors, visitors with no Security entifier, and uncategorized- to your site plus a distribution of the number of visits generated by your repeat visitors.

visitor platform
Type of operating system used by visitors to your site (i.e. Windows or Mac OS).

visitor subdomain
Determines the user's Internet service provider (i.e. a dial-up service like AOL).

visits by content category
Calculated by counting visits to a category each time a unique visit session includes a page view associated with that content category.

visits/visitor
The average number of unique visit sessions that each visitor made to your web site over the selected time period.

W

web logs

The audit trail of web server information detailing what the web serv was asked to do.

Section 5. Before you begin

Using the Control Pane

The Control Pane, located on the left side of the screen, allows you to

- Choose the measurements, area of analysis, sorting, dates, and filters for your data analysis via the tabs
- Start the data analysis process by pressing the "Update" button
- Clear previous selections on both the "Filters" and "Areas of Analysis" tabs with the "Clear All Filters" button

- See what Filters and Areas of Analysis you've chosen for the *next* data analysis by clicking on the "Summary" tab

You may perform the following tasks using the Control Pane:

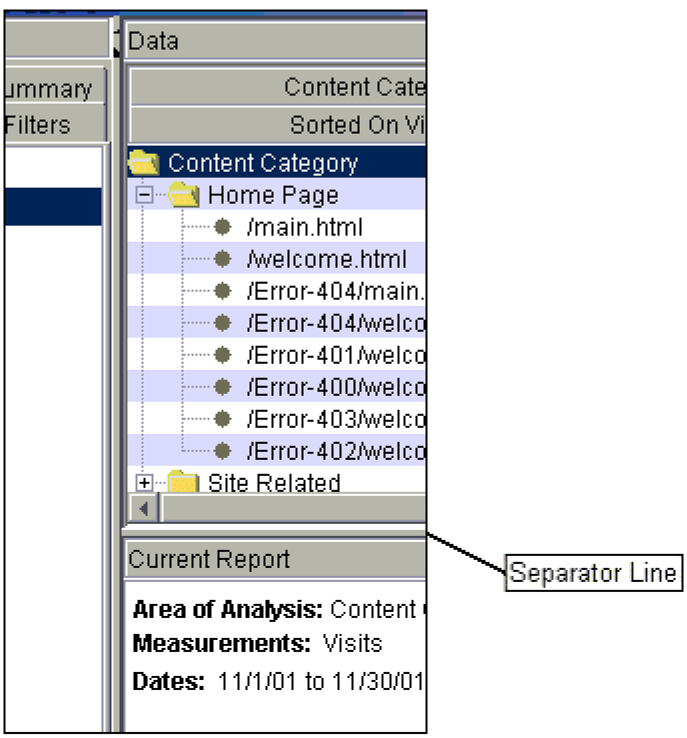
- Performing a Descending Sort
- Performing an Ascending Sort
- Sorting Categories by Measurements
- Removing Zero Categories
- Choosing Filters
- Clearing Filters
- Running Data Analysis Using Specific Dates
- Running Data Analysis Using Relative Dates

Customizing Your Data Analysis Window

Resizing the Panes

To change the size of the Control, Data, and Current Report Panes:

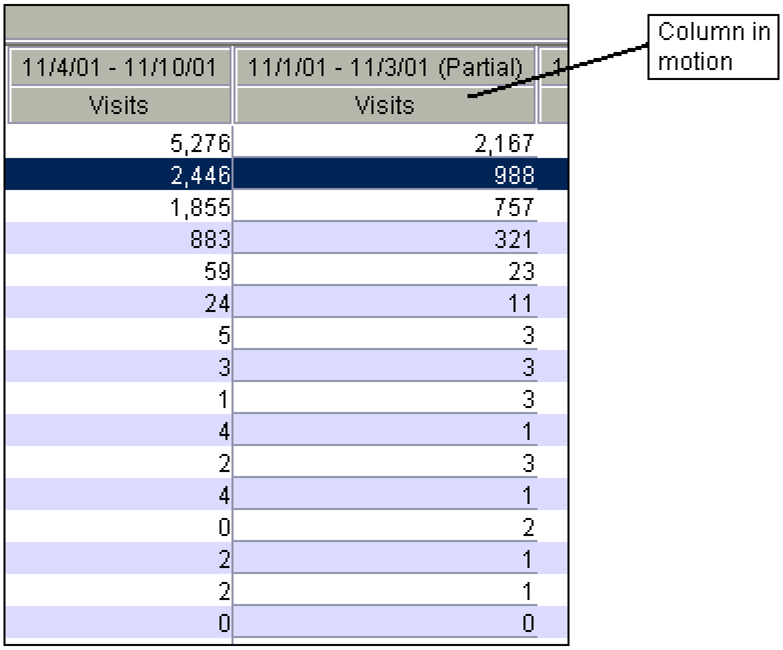
1. Left-click on the separator line of the desired pane, while holding button down
2. Move the mouse up, down, left or right, until pane is the desired size
3. Release the mouse button



Moving the Columns

To change the order of the columns displayed in the Data Pane:

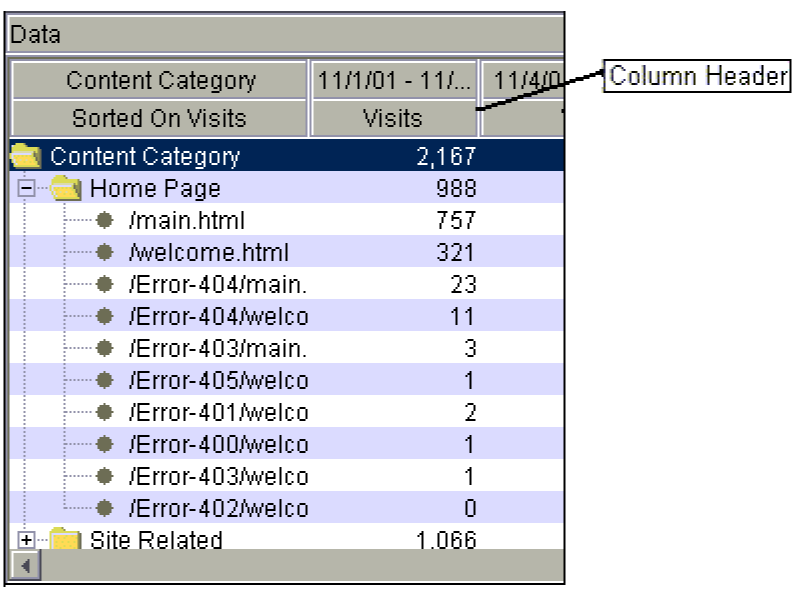
1. Left-click on the column header of desired column, while holding button down
2. Drag the mouse over to new column location
3. Release the Button



Resizing the Columns

To change the size of the columns displayed in the Data Pane:

1. Left-click on the column separator in column header, while holding button down
2. Move the mouse right or left to change size as desired
3. Release the mouse button

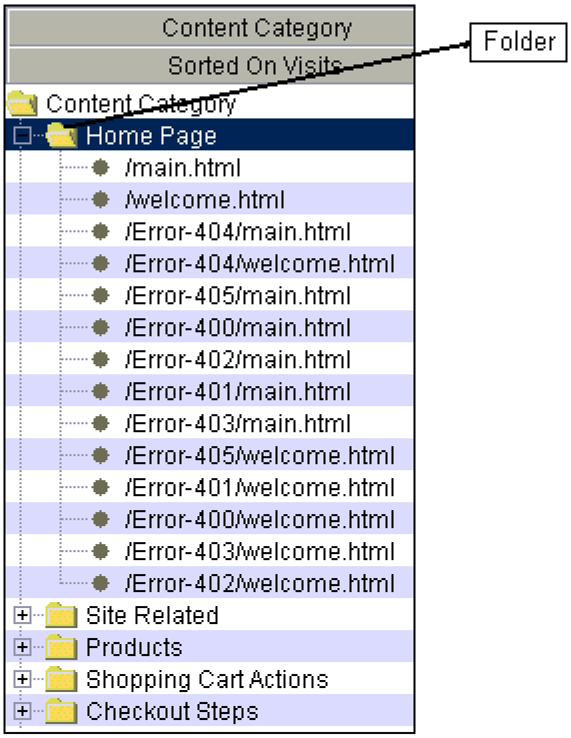


Working With Your Data Analysis Resources

Drilling Down to See Resources

To Drill down and see resouces,

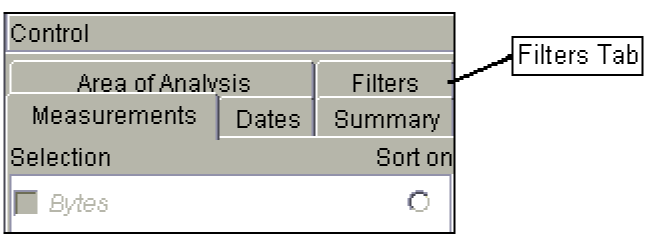
1. Choose a content category, after you have analyzed your data
2. Click on a folder to see its resources, when data is displayed in Data Pane



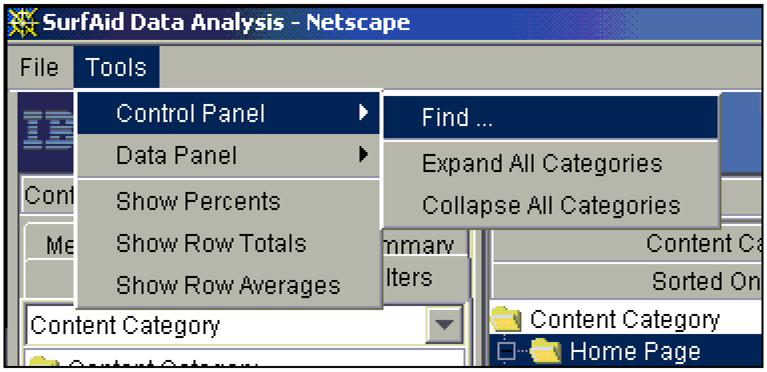
Finding a Particular Resource by URL

To find a particular resource by URL,

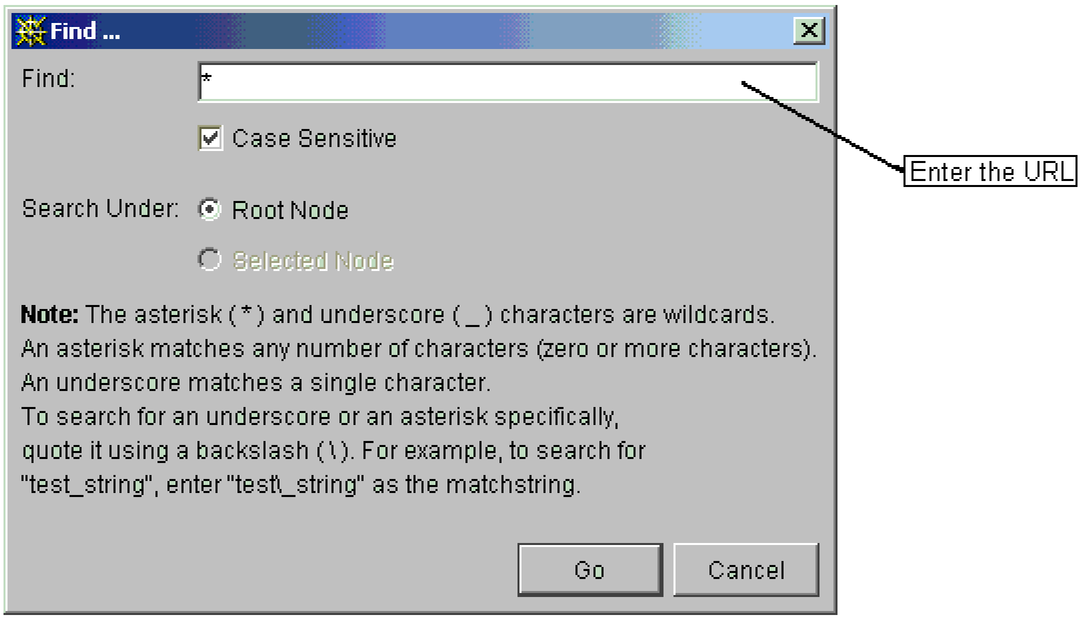
1. Choose an area of analysis
2. Click on the "Filters" tab on the Control Pane



3. Click on the "Tool" pull-down
4. On Tools pull-down, click "Control Panel" option
5. Click on "Find" option



6. When Find box is displayed, type in URL



7. Choose either the Root Node (highest category), or a selected node of a category you have already chosen
8. Click the "Go" button
9. Click on the "Update" button in the Control Pane to start the Find process

Resetting the Results of the Resource Find

To reset the results from a resource find,

1. Follow the instructions for Finding a Particular Resource by URL
2. Click on the "Dismiss Find Results" button in the Control Pane

---

Working with the File & Pull-Down Options

The File Pull-down

The File pull-down allows you to:

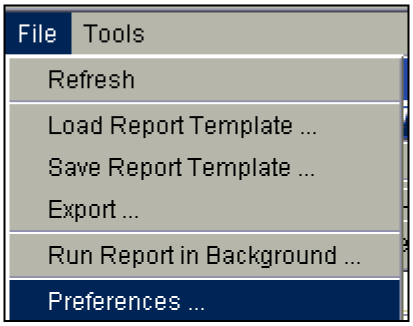
- Save the Report Template
- Load your Saved Report Template
- Create a Report Template

- Run a Report in the Background
- Change your preferences

Changing Your Preferences

You can customize the Data Analysis window to better suit your needs. To change your preferences follow these steps:

1. In the SurfAid Data Analysis window, click on the "File" menu
2. Select the "Preferences" option



3. Set a value for the "Maximum resources to be returned"

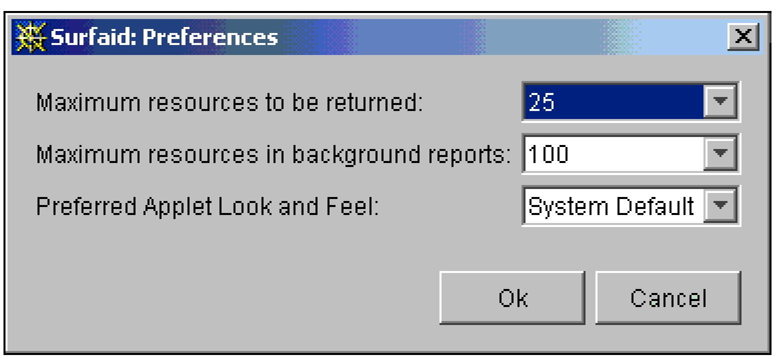
   Note: *The returned resources are displayed in the Data Pane when you open up a category*

4. Set a value for the "Maximum resources to be returned in background reports"

   Note: *The returned resources for background reports are displayed when you access the report through "Exported Reports" from the main page*

5. Choose an option for "Preferred Applet Look and Feel"

   Note: *This option affects the appearance of the windows and the scroll bar Whichever option you choose will be loaded the next time you access the SurfAid Data Analysis window*



The Tools Pull-Down

The Tools pull-down allows you to,

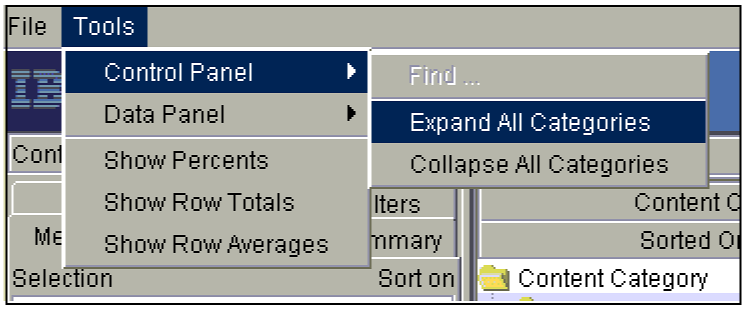
- Collapse or expand all categories in the Control or Data Panes
- Use a Boolean search string to narrow your data
- Display a resource in your web browser

- Show or hide percents in the Data Pane

Collapsing or Expanding All Categories in the Control or Data Pane

It is possible to collapse or expand all of the categories in the Control and Data Pane. To do so, follow these steps:

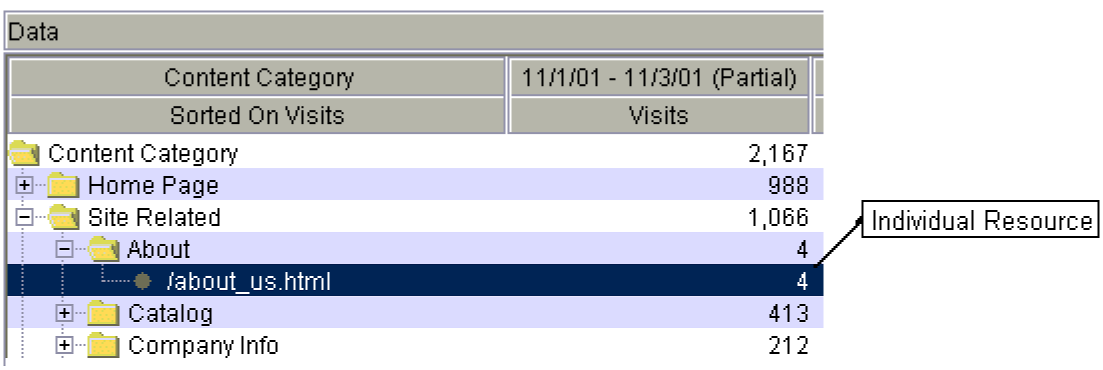
1. In the SurfAid Data Analysis window, click on the "Tools" menu
2. Select either the "Control Panel" or "Data Panel" option
3. Select "Collapse All Categories" or "Expand All Categories"



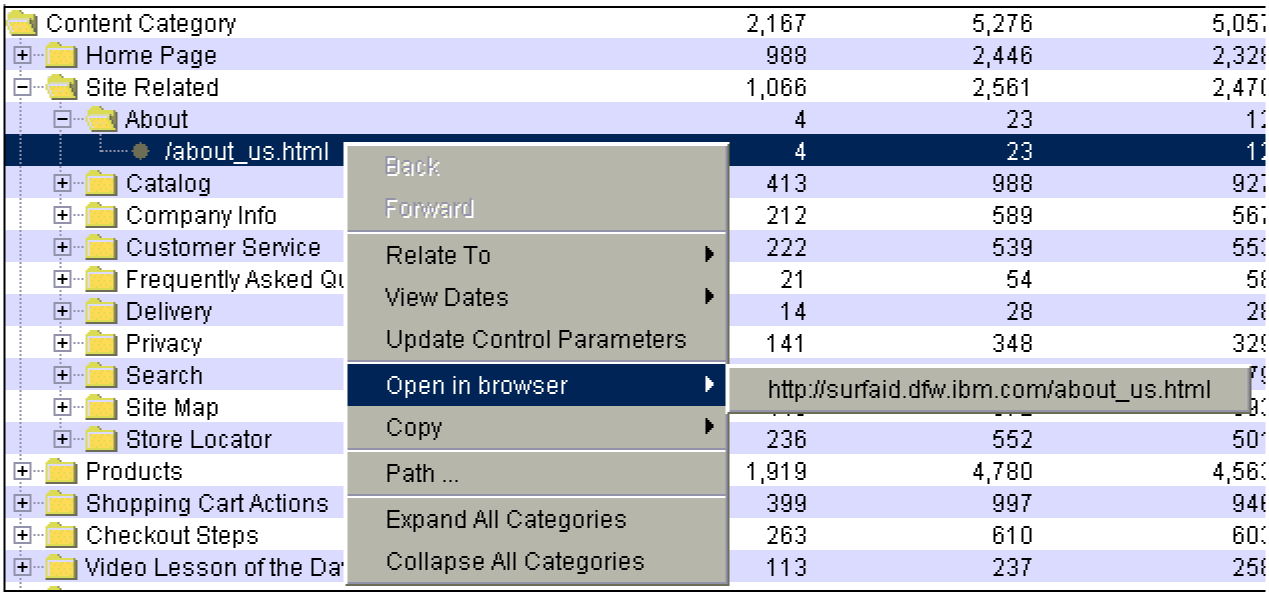
Displaying a Resource in Your Web Browser

To display a resource in your web browser, follow these steps:

1. After you have analyzed your web data, highlight the resource you want to view in the Data Pane



2. Right-click on the resource
3. Select "Open in Browser"
4. Click the name of the resource you highlighted and a new window will be displayed with the resource you selected



Usage Clustering

As an optional service, SurfAid can analyze usage clustering, which groups web site visitors into segments based on similar navigation activities. With this feature you can quickly decipher the content areas that are typically viewed within the same visits or by the same visitors.

Pathing Analysis

The path analysis report shows the following top paths through the site:

- Top 10 by day
- Top 10 by week
- Top 10 by month
- Top 10 paths with lengths between 2 and 5 pages views/visit
- Top n paths
- Top n paths organized by resource or content categories
- Maximum/minimum path depths

You can generate and display your own reports within the path analysis report or view your report in the background as an exported file.

SurfAid also gives you the capability to group page resources into meaningful content categories by defining a series of classification rules. These rules look at words within web addresses to determine which category the resource belongs. This feature makes it faster and easier for you to define rules for categorizing information.

Category Comparison

SurfAid's category comparison report compares traffic category results from day to day, week to week, day-of-week to day-of-week, and month to month. The report also shows significant changes in traffic increase and decrease by using the following red/yellow/green color scheme:

- Red signifies a change greater than 30%
- Yellow signifies a change between 20% and 30%
- Green signifies a change less than 20%

Graph on Demand
You can immediately generate graphs within the SurfAid interface for saved standard/exported reports. This allows you to create colorful graphs without launching any other programs. This graphing feature is available to any report containing at least 2 categories and saved in HTML. Options for creating graphs include:

- Graph type
- Graph title
- Number of elements to include
- Size of the graph
- Destination of the graph
- Attachment to the exported report

For more information, refer to Analyzing your Web Traffic Section 7 and Using a Boolean search string to narrow your data Section 8.

Data Display Options

Sorting results
You can sort analysis results in ascending or descending order, and by category. This makes it easier for you to customize how you want your results presented. For more information, go to Using a Boolean search string to narrow your data Section 8.

Sorting by clicking on table headers
You can now resort your category data by double-clicking on a column header in the Data Analysis data table. This makes it simple to reorganize your data totals. For more information, go to Using a Boolean search string to narrow your data Section 8.

Narrowing viewed data
You can narrow your view of the data by using boolean search operators such as AND, NOT and OR. This is available in the SurfAid Analysis "Find" function. For more information, go to Using a Boolean search string to narrow your data Section 8.

Selecting multiple categories
You can choose multiple categories or resources for data analysis filters instead of being restricted to only one filter parameter. This will increase the accuracy of your data analysis results. For more information, go to Using a Boolean search string to narrow your data Section 8.

Mapping objects to multiple matchstrings
You can now use multiple matchstrings to create categories for your reports. This preserves the precedence of the specified matchstring parameters and allows you to easily organize your results. For more information, go to Mapping Objects to Matchstrings Section 10.

Using row totals
You can total your dated measurements like Page Views and Visits to get a sum of views or visits during that time period. This makes it easier for you to find out the general performance of your site according to the calculated totals. For more information, go to Viewing data row totals Section 8.

Opening a separate browser
You can use the "Open in Browser" function to launch a resource's URL in a new web browser window. This allows you to view multiple pages simultaneously.

Using Cut/Copy/Paste
You can use the cut/copy/paste function for Data Analysis, Category Editor, and Security Admin. Cut/copy/paste

will work from any text field in these sections.

Adjusting analysis dates
You can change the default dates for analysis reports by specifying relative dates such as "last 3 months" or "last 5 days" instead of a beginning and end date. For more information, go to Setting absolute and relative dates Section 8.

Changing the start day for reports
You can choose a flexible "start of week" day by specifying any day of the week as its first day. This allows you to tailor the results depending on how you will use the SurfAid reports. For more information, go to Setting absolute and relative dates Section 8.

Viewing top sheets and standard reports
You can view topsheet data and update database information simultaneously instead of performing each task separately. All exported and standard reports are also available during database processing. For more information on standard reports, go to Viewing Your Standard Report Section 6

Downloading reports
You can download generated reports directly to CSV. You also have the option to download reports with or without HTML.

Showing data without categories
You have the option of viewing all reports without the data being divided into categories. This allows you to review the reports without the complication of categorized data. For more information, go to Viewing your data analysis without categories Section 8.

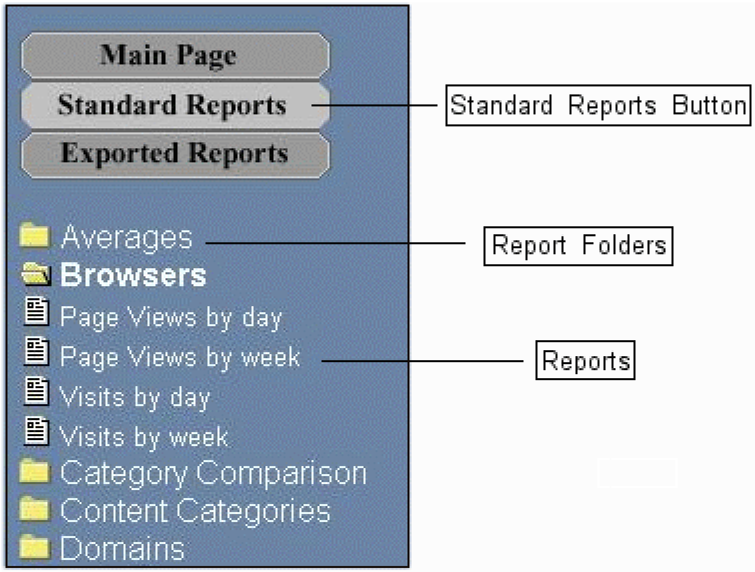
Section 6. Working with Standard & Exported Reports

SurfAid allows you to do the following:

- View prepared standard reports
- Export reports for later viewing
- Create new report templates to suit your needs
- Run reports in the background to free up time

Viewing Your Standard Report
To view your Standard Reports, follow the steps below:

1. From the sidebar on the Main Page, click on "Standard Reports"
2. Click the report folder that contains the report you want to view
3. Choose the report you want to view
4. Click on the report and the contents will be displayed



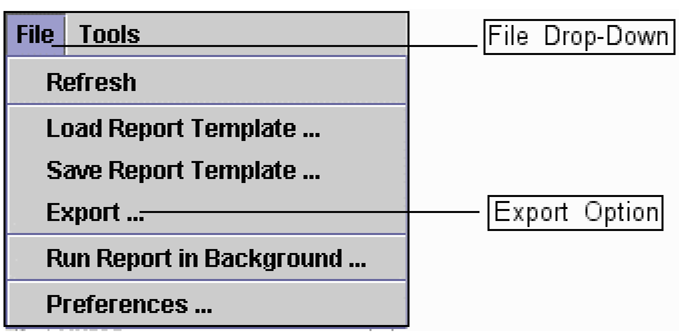
IP/Subdomain-based Spider Filtering

SurfAid can filter against resolved subdomains and IP's of potential spiders and robots.
This provides more protection for your site against spider activity which you can view in the Standard Reports.

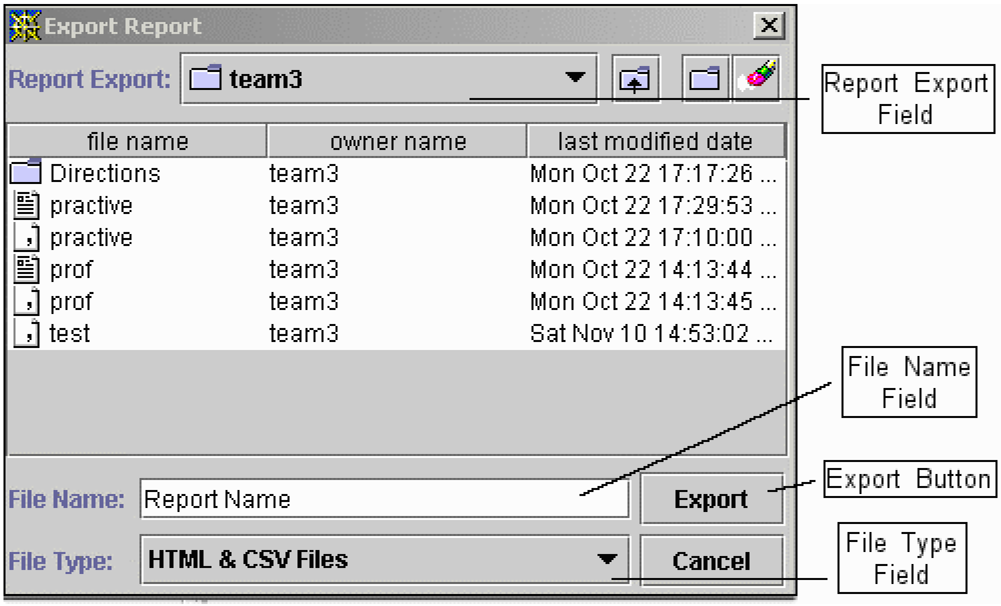
Creating an Exported Report

To create and Exported Report, follow the steps below:

1. Generate a report. (See Analyzing Your Web Site's Data in Section 7 for instructions on generating various reports.)
2. In the "File" drop-down, click the "Export" option



3. In the "Report Export" field, select a folder in which to store your report
4. In the "File Type" field, select a type of file
5. In the "File Name" field, type a name for your report
6. Click on the "Export" button

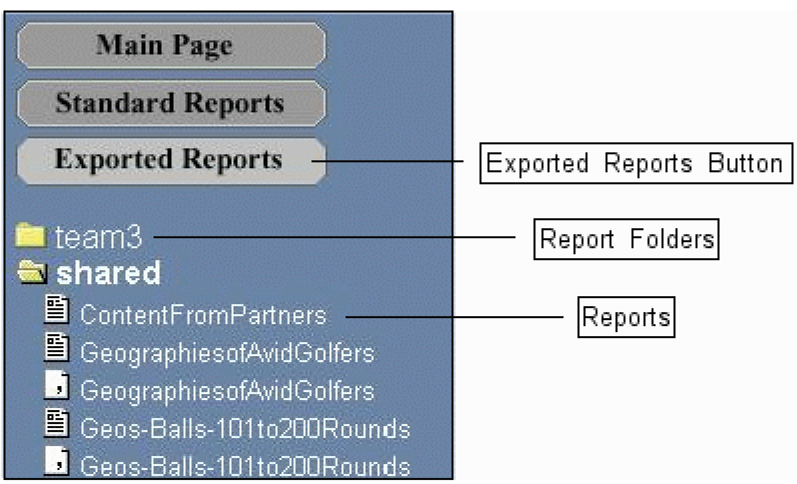


Viewing Your Exported Report

To view your Exported Report, follow the steps below:

1. From the Main Page sidebar, click on the "Exported Reports" button
2. Click on the report folder that contains the report you want to view
3. Choose the report
4. Click on the report and the contents will be displayed

Note: *If you click on a folder and it does not display any reports, the folder either does not contain any reports or you do not have access to those reports*

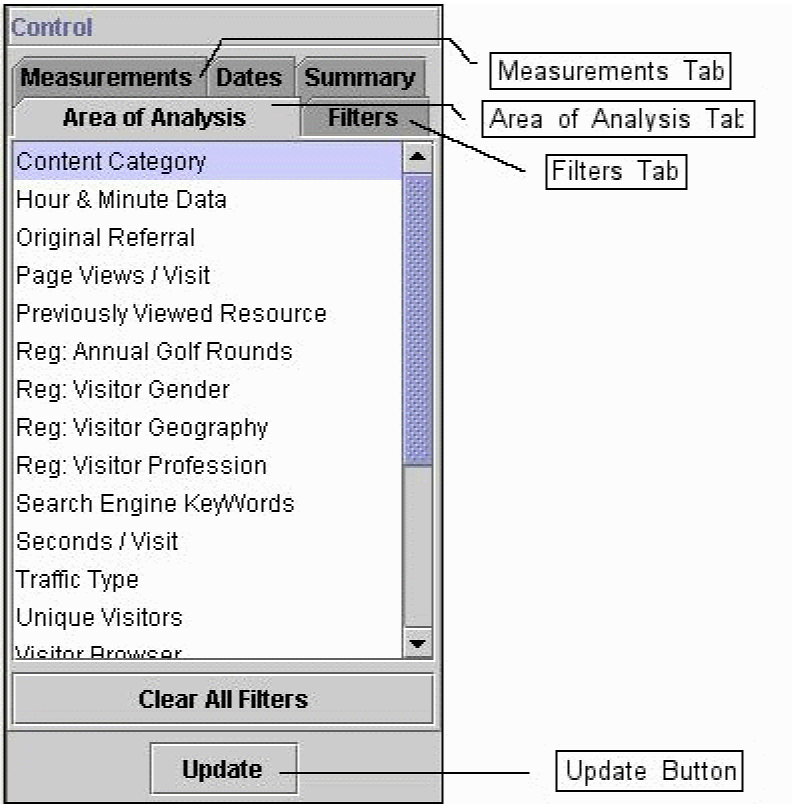


Creating a Report Template

Creating a report template allows you to view a specific data analysis without setting the filters and measurements every time you wish to view the report.

1. From the Main Page, select the "Data Analysis" link

2. Under the "Area of Analysis" tab, select the option you want to view
3. Select any filters or measurements you want on the data
4. Click on the "Update" button



Saving the Report Template

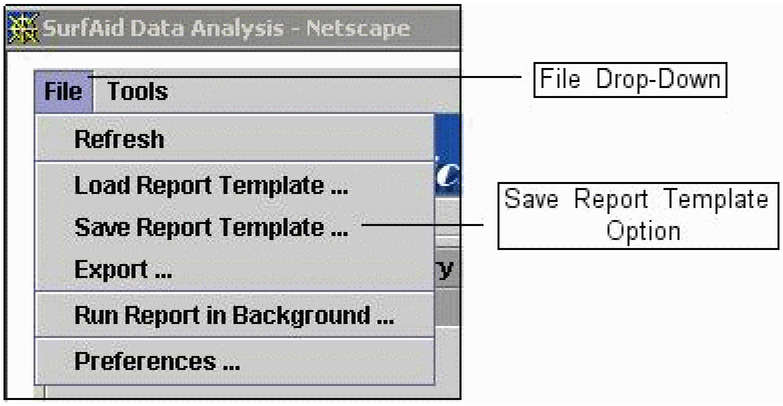
You can save a report template into the following folders:

- shared folder
- different folder
- new folder

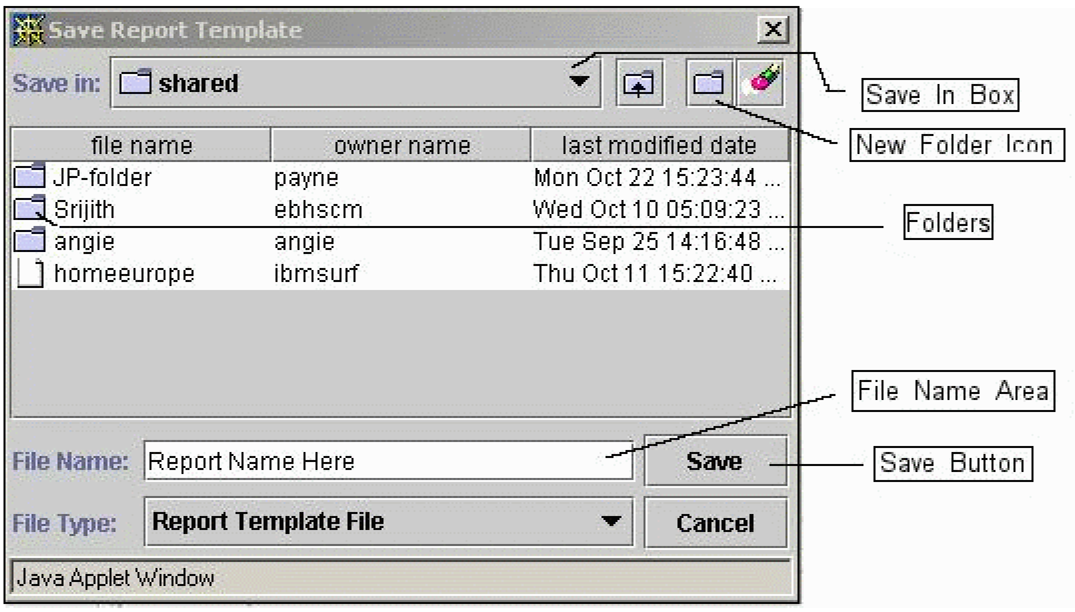
Saving Into a Shared Folder

To save into a shared folder where anyone in your company with access to SurfAid can use your report template, do the following:

1. At the top of the Data Analysis screen, click on the "File" drop-down.
2. Select the "Save Report Template" option



3. In the "File Name" area, type the name of your report template
4. Click on the "Save" button



Saving Into a Different Folder

To save your report template into a different folder, do the following:

1. At the top on the Data Analysis screen, click on the "File" drop-down
2. Select the "Save Report Template" option
3. Select the folder by double-clicking on it or by selecting the down arrow of the "Save in" box
4. In the "File Name" area, type the name of your report template
5. Click on the "Save" button

Saving Into a New Folder

To save your report template into a new folder, do the following:

1. At the top of the Data Analysis screen, click on the "File" drop-down
2. Select the "Save Report Template" option
3. Click on the "New Folder" icon.
4. Click once on the "New_Folder" file
5. Click on the "New_Folder" file again
6. Highlight "New Folder"
7. Type in the folder name you want
8. Press "Enter" on your keyboard

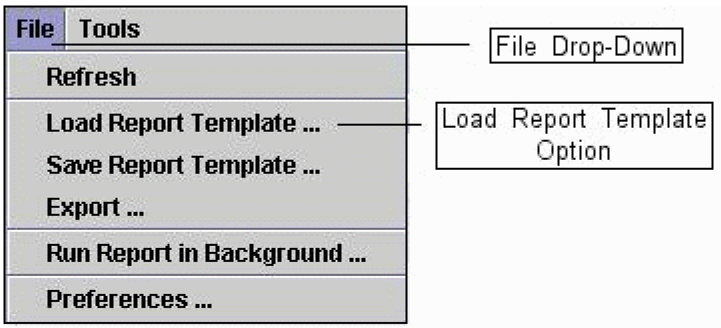
9. Go to step 3 of Save into a Different Folder .

Loading Your Saved Report Template

Your report template must be saved before it can be loaded. See Save the Report Template for instructions on saving report templates.

To load a report template, do the following.

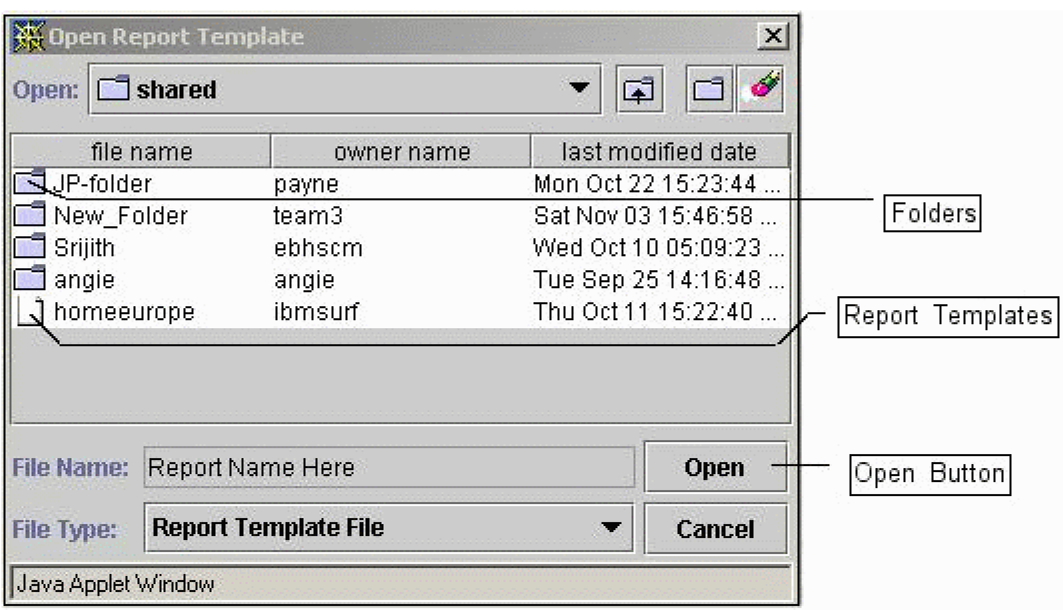
1. At the top of the Data Analysis screen, click on the "File" drop-down
2. Select the "Load Report Template" option



3. Find the saved report template

Note: *If you do not immediately see the report template you want to view, you may need to look in a different folder*

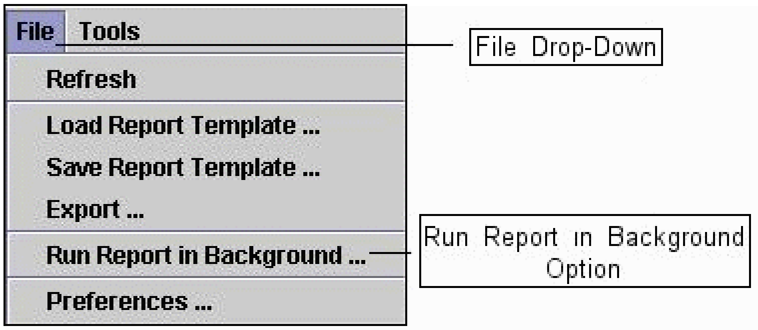
4. Click on the report template you want
5. Click on the "Open" button
6. In the Control Pane click on the "Update" button



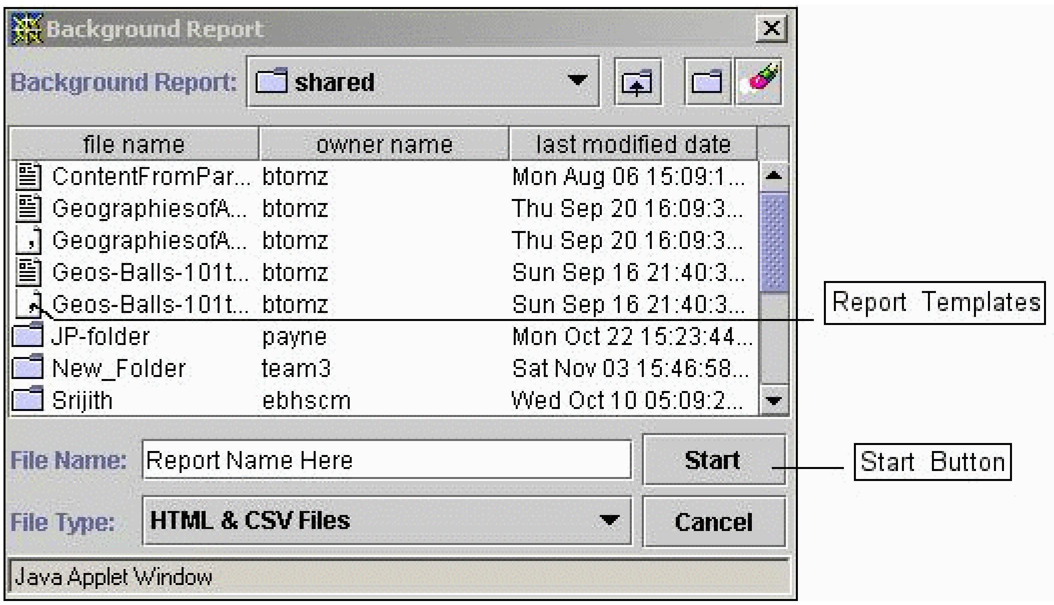
Running a Report in the Background

Large or complex reports may take some time to execute. You can run them in the "background" while you do other work.

1. At the top of the Data Analysis screen, click on the "File" drop-down
2. Select the "Run Report in Background" option



3. Select the report template you want to run
4. Click on the "Start" button

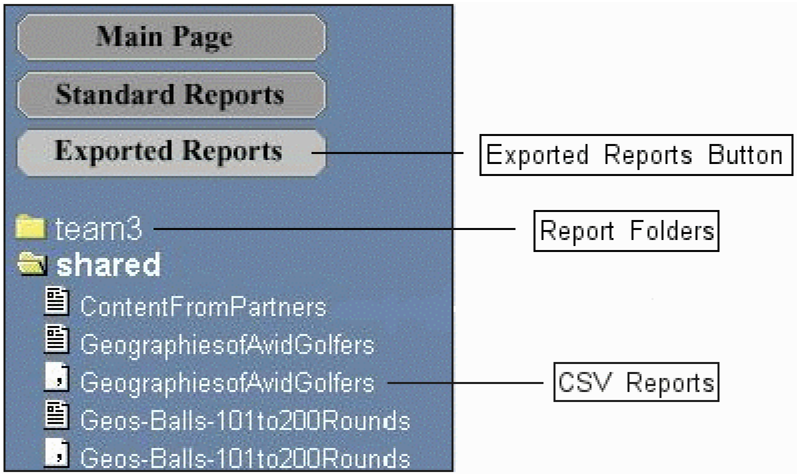


5. Follow the steps in Viewing Your Exported Report to view the finished report.

Downloading Your Report to a CSV File

You can view a CSV file with most spreadsheet programs. Microsoft Excel is an example of one such program. To download a report to a CSV file, do the following:

1. Create an exported CSV report. See Creating An Exported Report for information.
2. Click on the browser window that contains your "Main Page". (This is the window where you clicked the "Data Analysis" link.)
3. Click on the "Exported Reports" button
4. Click on the folder where your CSV report is saved
5. Click on the CSV report you saved



6. In the window that pops up, click on the "Save File" button
7. Choose a location on your hard drive or local network drive to store the file
8. Click on the "Save" button

Now, you may use a spreadsheet program to open the file from the location you saved it

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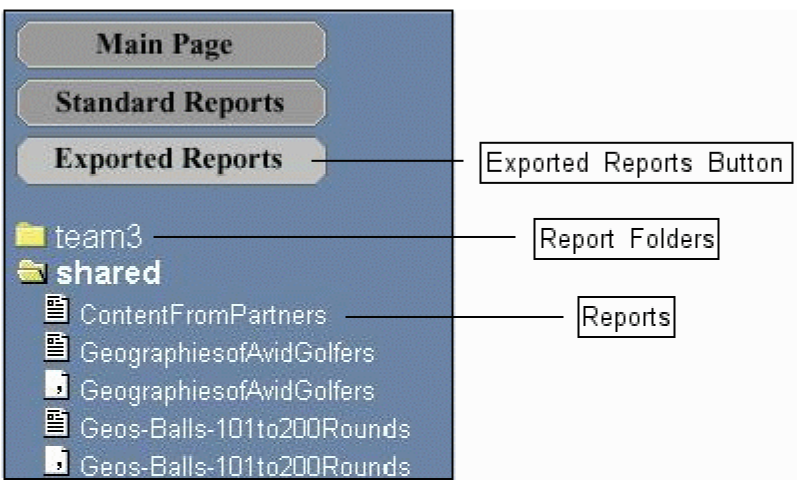
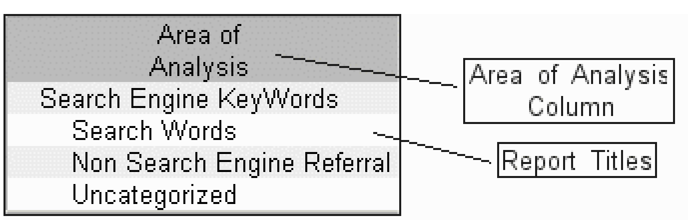
Using "Graph on Demand" to Generate Graphs From Your Reports

You can use SurfAid to create graphs of information in your exported reports.

1. From the Main Page, click on the "Exported Reports" button
2. Click on the folder where your report is saved
3. Choose the report you want to graph



4. Under Area of Analysis column, click on the title of the report



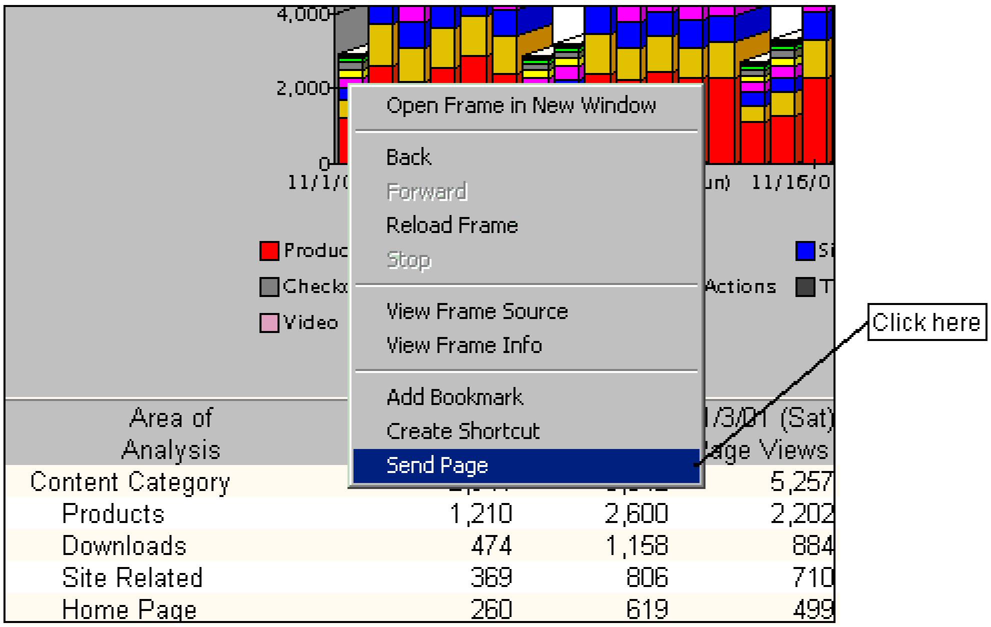
5. From the Graph Information screen, choose the options for your graph

6. Click the "Display Graph" button to display the graph. Your graph will be displayed in a separate browser window.

E-mail Your Standard Report or Exported Report

To e-mail a report,

1. left click on the report
2. select "Send Page"



Note: *You must have a default e-mail set up for this to work.*

Section 7. Analyzing Your Web Site's Data

SurfAid provides you with many tools to analyze your web site's data. Three common data analysis reports are:

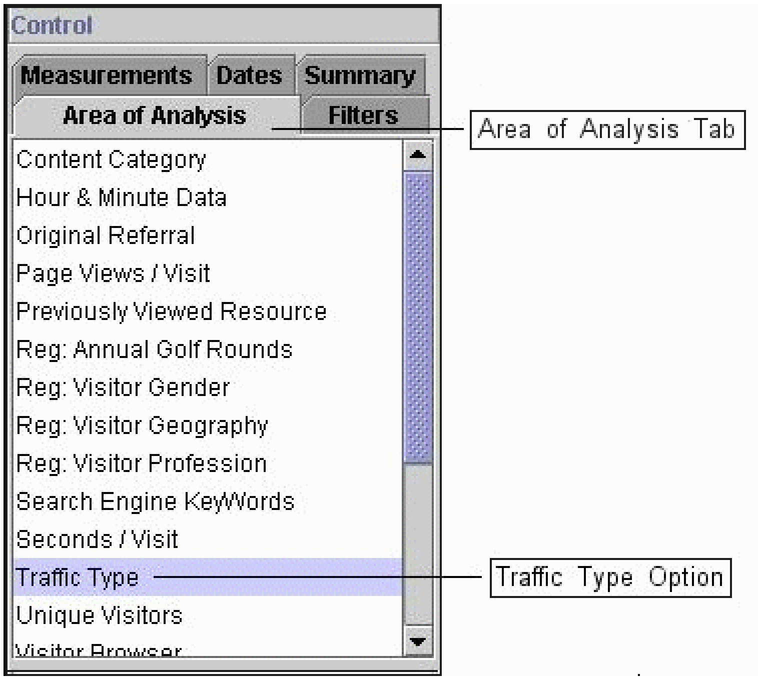
- Traffic type
- Content categories
- Visitor referrals with a filter

You can perform these data analysis reports by following the directions below.

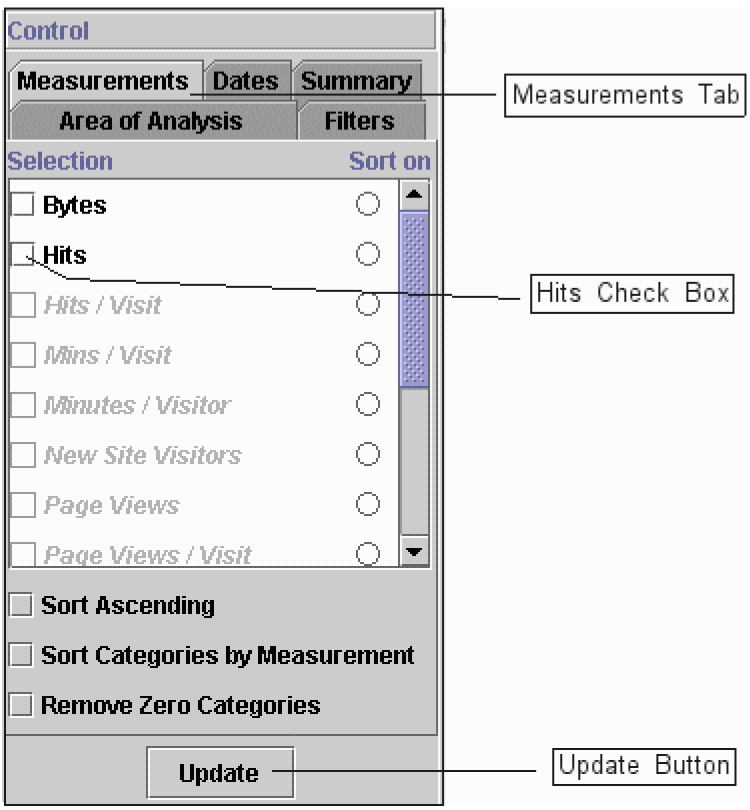
Analyzing Your Web Traffic

This analysis shows you the count of hits for all of the different traffic types. You can customize them to your needs.

1. From the Main Page, click on the "Data Analysis" button.
2. From the "Area of Analysis" tab in the Control Pane, click on the "Traffic Type" option.



3. From the "Measurements" tab, click on the "Hits" check box.
4. Click on the "Update" button to display the results.

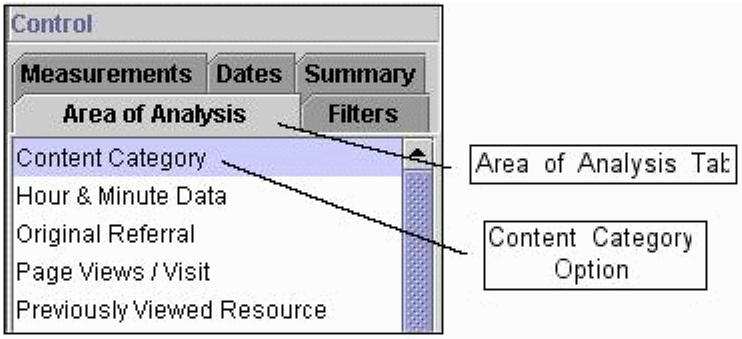


Note: *If you want to see percentages displayed in addition to the counts, click on the "Show Percents" check box in the "Tools" drop-down.*

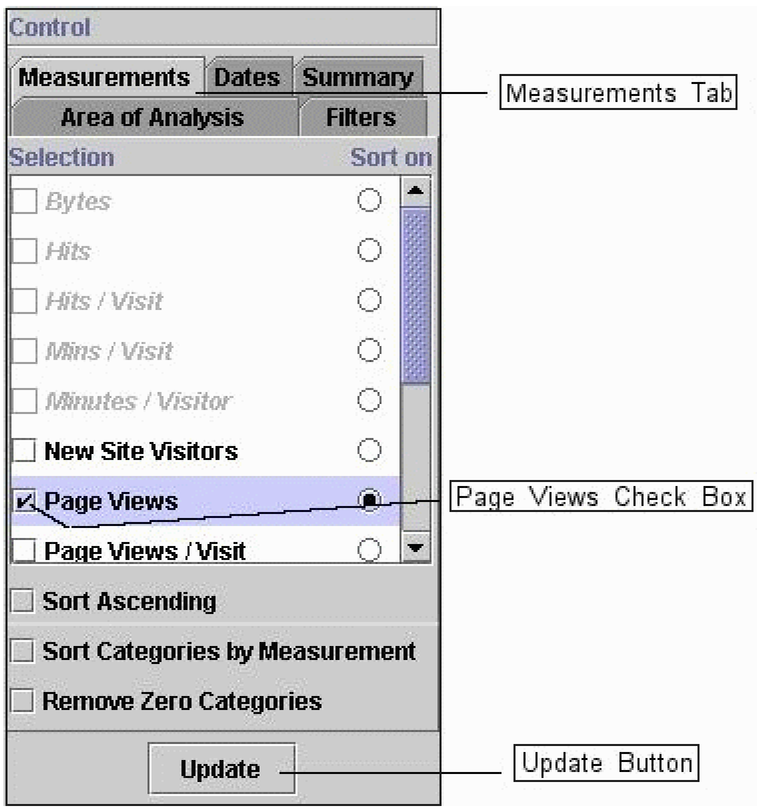
Analyzing Your Web Site Content Categories

This analysis shows you the count of page views for all of the page content categories you have.

1. From the Main Page, click on the "Data Analysis" button.
2. From the "Area of Analysis" tab in the Control Pane, click on the "Content Category" option



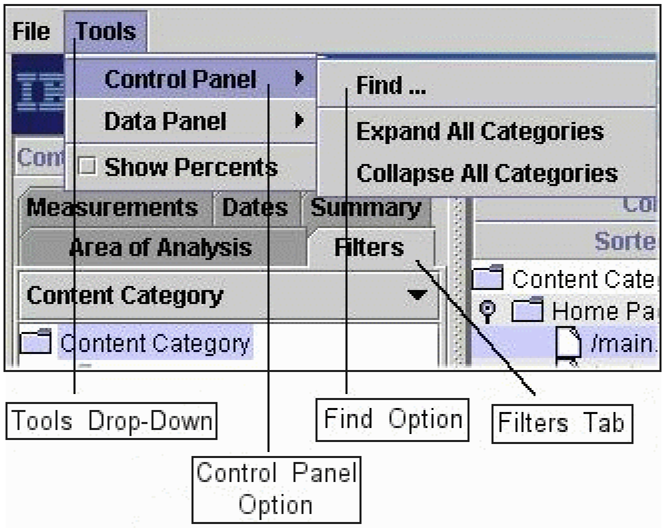
3. From the "Measurements" tab, click on the "Page Views" check box
4. Click on the "Update" button to display the results



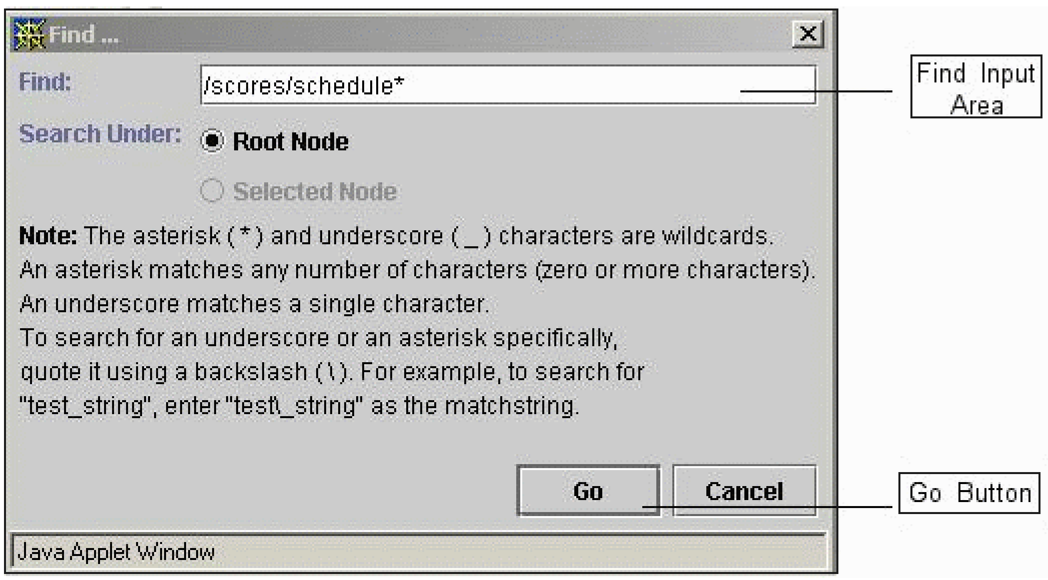
Analyzing Your Content Categories Using the "Find" Function

Shows your Content Categories for a set of URL resources using the "Find" function.

1. In the Control Pane, click on the "Filters" tab
2. Click on the "Tools" drop-down
3. Select the "Control Panel" option
4. Select the "Find" option



5. Type in the text or a portion of the text you are looking for in the "Find" input area
6. Click on the "Go" button



7. In the Control Pane, click on the "Update" button to start the find process

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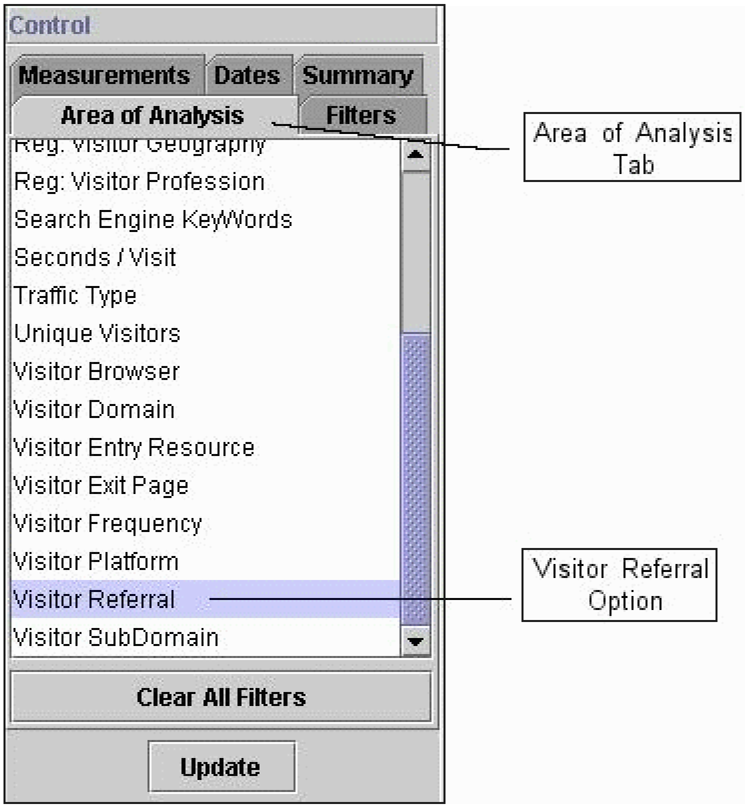
Using a Filter to View Multiple Categories

Anytime you generate a report using filters, such as Analyzing Visitor Referrals with a Filter , you can select multiple filters simply by holding the "CTRL" key when clicking on subsequent filters.

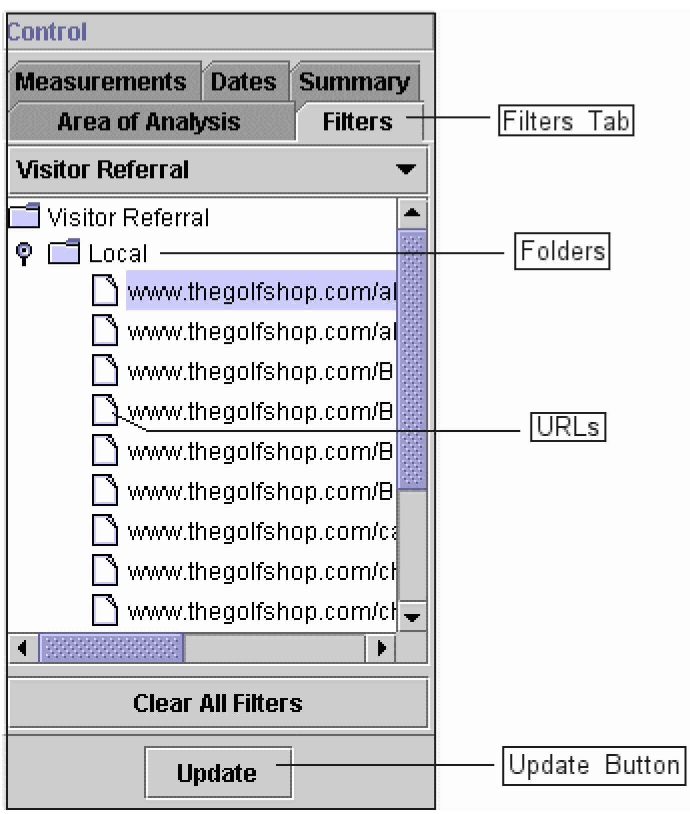
Analyzing Visitor Referrals with a Filter

You can show the Visitor Referral information for all Home Page traffic.

1. From the "Area of Analysis" tab in the Control Pane, click on the "Visitor Referral" option



2. Click on the "Filters" tab
3. Double click a folder to retrieve referral locations
4. Select a URL
5. Click on the "Update" button to display the results in the right hand Data Pane

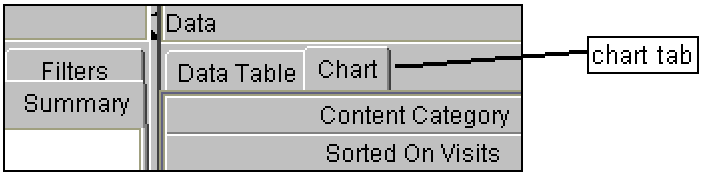


Analyzing Your Web Site Data with Graphs

In the Data Analysis interface, you can create on-demand graphs and charts. These graphs and charts can be viewed and modified via the Chart tab on the Data panel. A series of pull-down menus, advanced options, and right click choices gives you the ability to further customize each report with virtually instant results.

To get to the graphing interface,

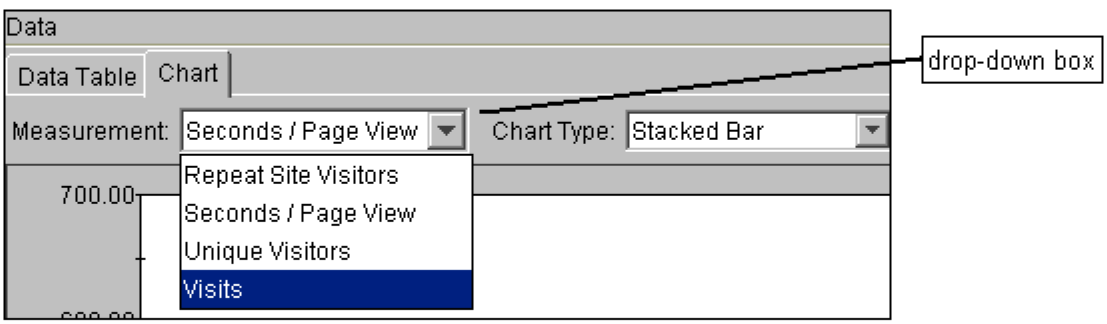
1. Click on the Data Analysis link on the Main Page
2. Select your desired Area of Analysis, Measurements, Dates and any desired Filters
3. Click Update
4. Click on the Charts tab in the right pane



Changing the Measurement

If you have multiple measurements selected, you can change between the different measurements. To change between measurements,

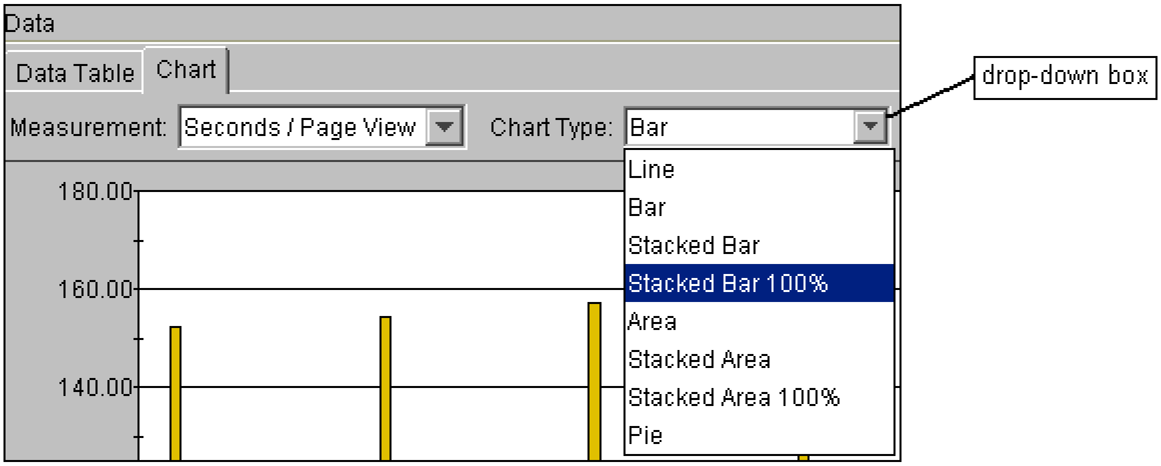
1. Click on the drop-down box called Measurements toward the top of the screen
2. Select a different measurement from the drop-down list
   - ✍ Your change will automatically be updated



Changing the Graph Type

You can also change the type of graph you are viewing. To change the graph,

1. Click on the drop-down box called Chart Type toward the top of the screen
2. Select a different chart type from the drop-down list
   - ✍ Your change will automatically be updated



Drilling Up and Down

There are several different ways to view your data. You can view high level categories all the way down to low-level resources. The following are several different ways to drill up and down within your data:

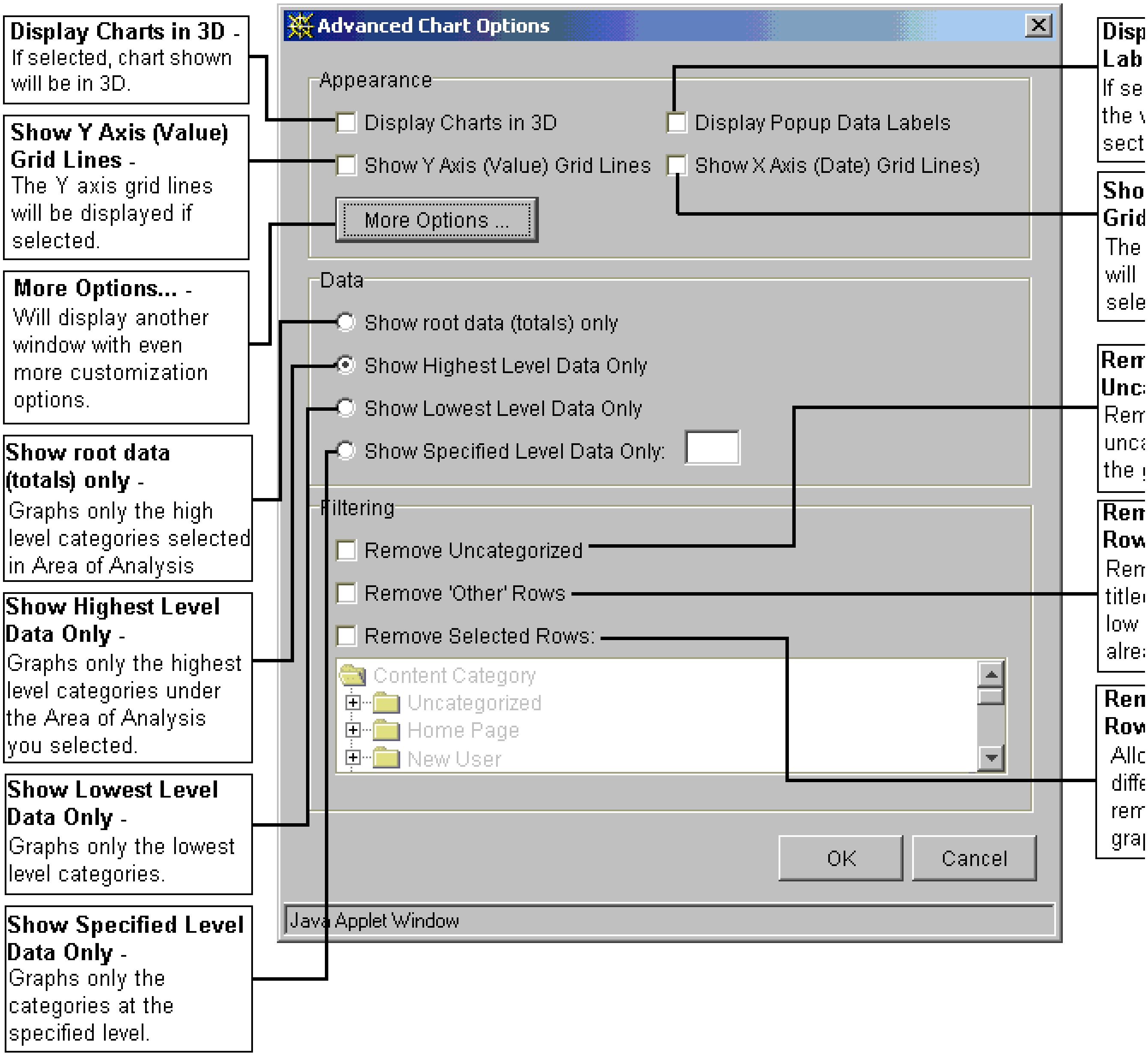
- Right-click on your mouse button to
  - Drill down from where you are
  - Drill up from where you are
  - Reset the graph back to your original graphing specifications
  - Automatically expand to the lowest level resource

- Double click on any part of the chart to drill down or one of the keys in the right pane

Note: *The information shown in Data Analysis will change with any drills you do.*

Advanced Features

You can customize your graph in several different ways. The following shows the different ways to change your graph when you click on the Advanced button:

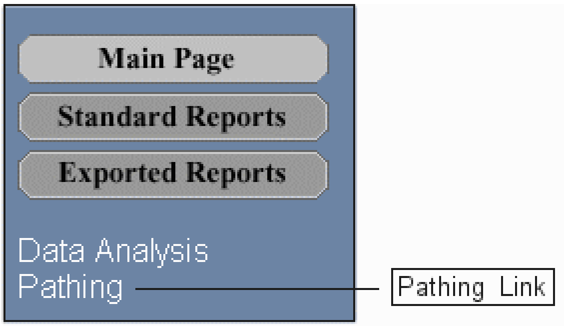


Click on the Ok button when finished to see your changes.

Analyzing Your Web Site Data Using the Pathing Tool

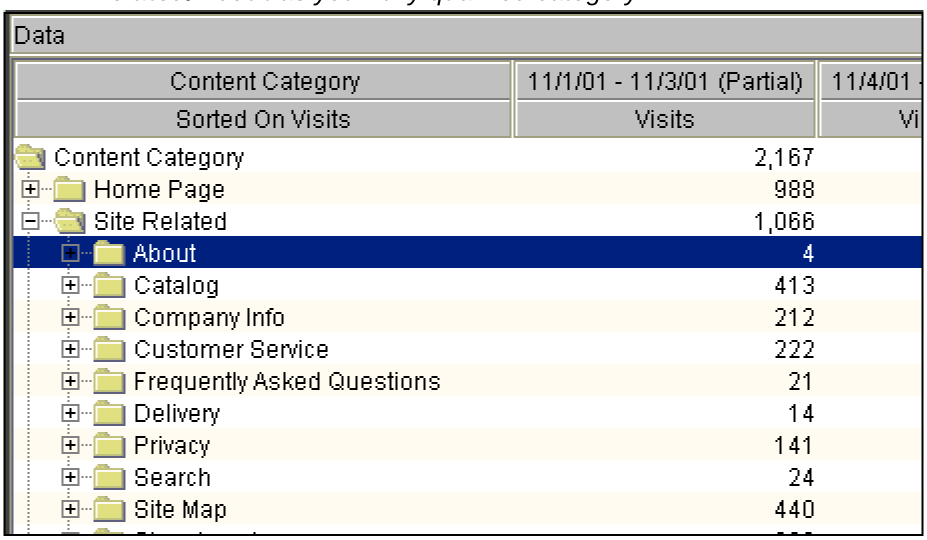
You can track usage for visit paths that contained any particular URL(s) or category by using the Pathing Tool.

1. From the Main Page, click the "Pathing" link.



2. In the screen that appears, select the web site you want to path from the "Web Site" drop-down area
3. Select either "Resource" or "Category" for your anchor
4. Type in the URL or Category you want to path next to the anchor you selected (you can also hit "Browse" to browse for the item you want)

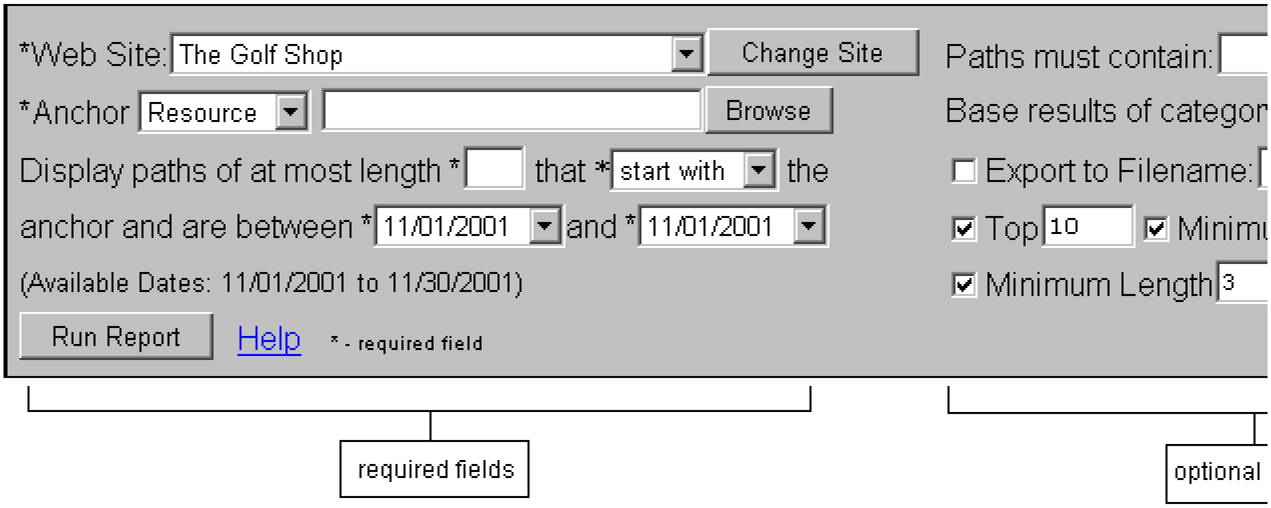
Note: _If you use a category for your anchor, the name of the category you type in this field must be fully qualified. This means that the category must contain the area of analysis as well as any higher levels categories above it. For the figure below, you would use **Content Category/Site Related/About** as your fully qualified category._



Data

Content Category	11/1/01 - 11/3/01 (Partial)	11/4/01 -
Sorted On Visits	Visits	Vi
Content Category	2,167	
Home Page	988	
Site Related	1,066	
About	4	
Catalog	413	
Company Info	212	
Customer Service	222	
Frequently Asked Questions	21	
Delivery	14	
Privacy	141	
Search	24	
Site Map	440	

5. Type in a number for the largest path you want to view
6. Select whether the anchor should be at the end, beginning, or contained within the path
7. Type in a start date (available dates are shown below the field)
8. Type in a stop date (available dates are shown below the field)
9. Type in keywords for the path to contain in the "Paths must contain" field (optional)
10. Select the desired area to sort your results on in the "Base results of category-pathing on" field (optional)
11. Type in a file name to export your report to in the "Export to Filename" field (optional)
12. Select the top number of paths to display in the "Top" field (optional)
13. Select the minimum number of times for the path to occur in the "Minimum Frequency" field (optional)
14. Click on the "Run Report" button to begin your search



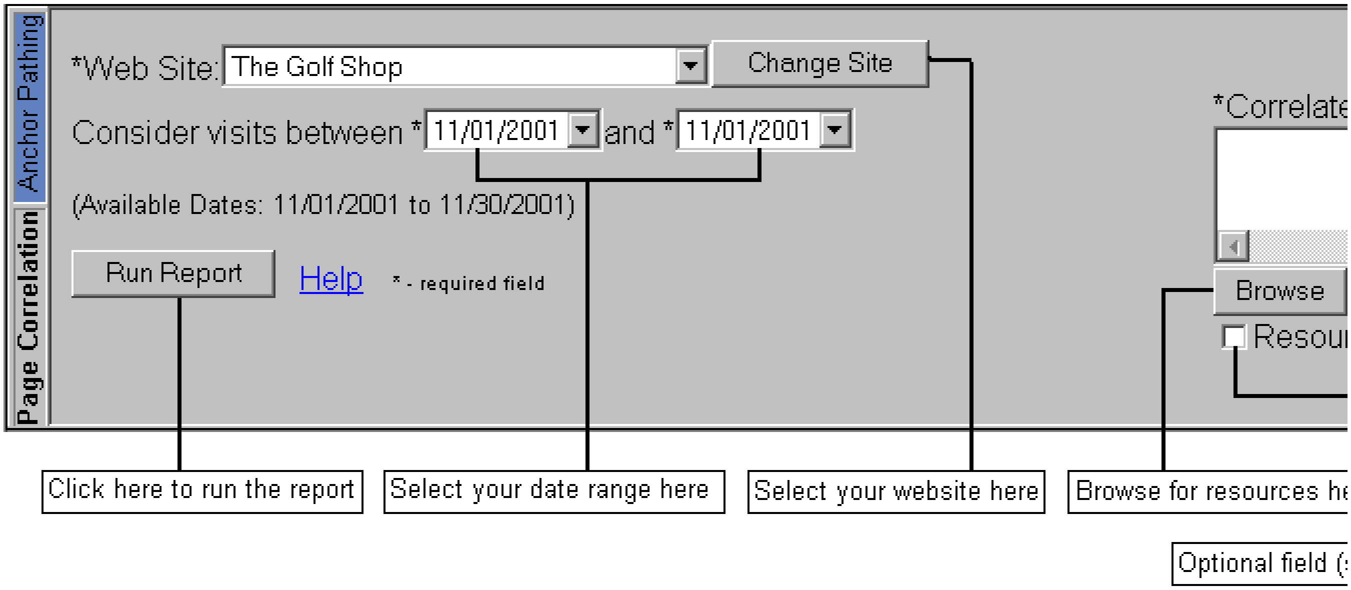
Note: *If you need help with the Pathing Tool, click on the help button located in the bottom left of the screen.*

Page Correlation

The Pathing interface has the added capability of correlating visit behavior during visits. By specifying two or more pages, users can now see the total number of visits that visited all or part of that list of pages in the their visit. These reports can be accessed by clicking on the tab just to left on the Pathing Interface. Also, please notice there is a Help Menu available within the interface.

To correlate visit behavior,

1. Open the Pathing tool by clicking on "Pathing" from the Main Page
2. Click on the "Page Correlation" tab on the left side of the Pathing page
3. If you have access to multiple site, select the site you wish to correlate pages on from the drop-down box titled "Web Site"
4. Click on the "Change Site" button if you changed the site to correlate pages on
5. Select the date range you want to consider for your correlations from the two date drop-down boxes
6. Type in or browse for two or more resources you wish to correlate
7. Check the box called "Resources must be in relative order" if you want a visit to only be counted if it contains the elements, separated by 0 or more resources, in the same order as specified in the entry list or leave the box blank if you want visits to be counted that contain the elements in any order
8. Click on the "Run Report" button to view your results



Downloading and Exporting a Pathing Report to CSV

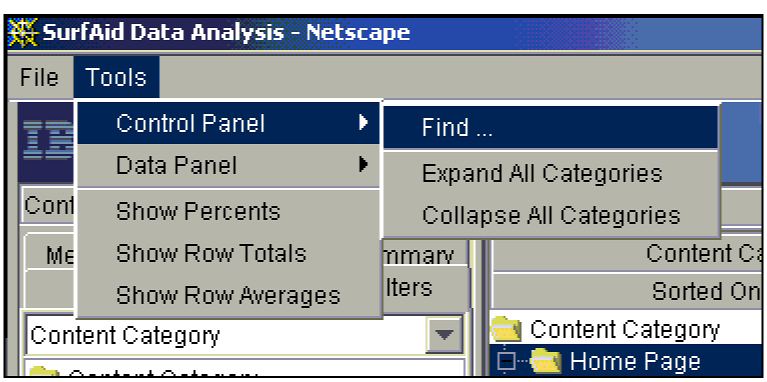
After you have ran a pathing report, you can download the report into a CSV format or export the report. To do this, just click on either "Get CSV" or "Export Report and CSV" at the bottom of the screen and follow any directions.

Section 8. Customizing Your Data Analysis.

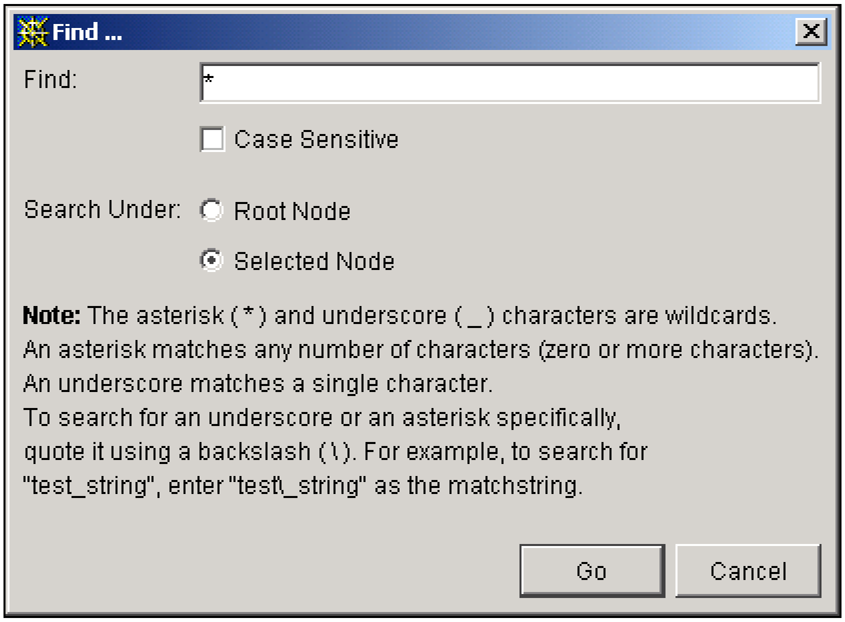
Using a Boolean Search String to Narrow Your Data Analysis

You can use a Boolean search string to help narrow down to the results you want to see.

1. Once data analysis is complete, click on the "Tools" option in the upper left corner of screen
2. When drop-down menu appears, click on the "Control Panel" option
3. When the "Control Panel" menu expands, click on the "Find" option



4. Type in URL or keyword



Use as many wildcards (asterisks) as you need. For example:

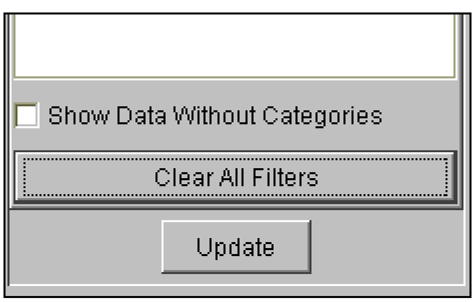
- Use *.html for all html files
- Use *news* for all files with "news" embedded
- Use *stocks*.htm for all files whose extension starts with "htm" and have "stocks" in the filename

5. Click either "Root Node" or "Selected Node" radio button
6. Click on the "Go" button
7. Click on the "Update" button to display results

Viewing Your Data Analysis Without Categories

You can view your Data Analysis results without the categories by following the steps below:

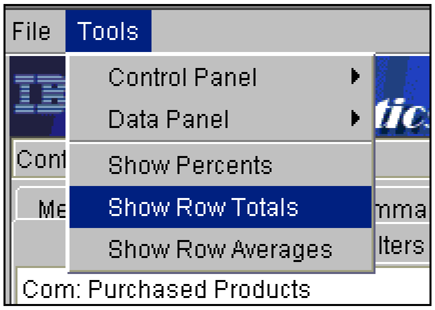
1. Once Data Analysis is complete, click on "Area of Analysis" tab in Control Pane
2. Click on "Show Data Without Categories" check box at the bottom of the Control Pane
3. Click on the "Update" button to display results



Viewing Data Row Totals

You can view the total number of data shown for one row by following these steps:

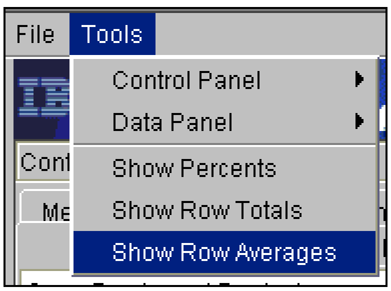
1. Once Data Analysis is completed, click on the "Tools" menu option in upper left corner of screen
2. When drop-down menu appears, click on the "Show Row Totals" option
3. Click on the "Update" button to display results



Viewing Data Row Averages

You can view the average number for data shown in one row by following these steps:

1. Once Data Analysis is completed, click on the "Tools" menu option in upper left corner of screen
2. When drop-down menu appears, click on the "Show Row Averages" option
3. Click on the "Update" button to display results

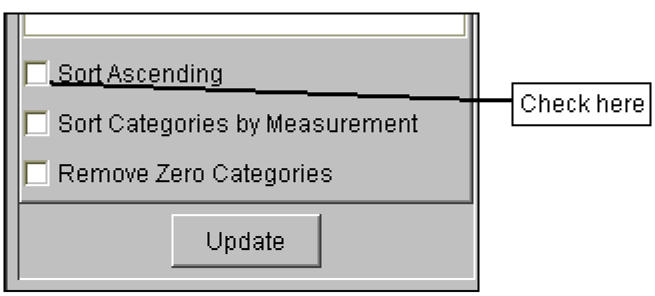


Resorting Category Data in Ascending or Descending Order

Performing an Ascending Sort

To sort your data in ascending order,

1. Click on the "Measurements" tab
2. Click on the boxes to the left of the desired measurement to select
3. Below the Measurement list, click on "Sort Ascending"



Performing a Descending Sort

To sort your data in descending order,

1. Click on the "Measurements" tab
2. Click on the boxes to the left of the desired measurement to select

3. Click on the radio button to the right of the desired measurement

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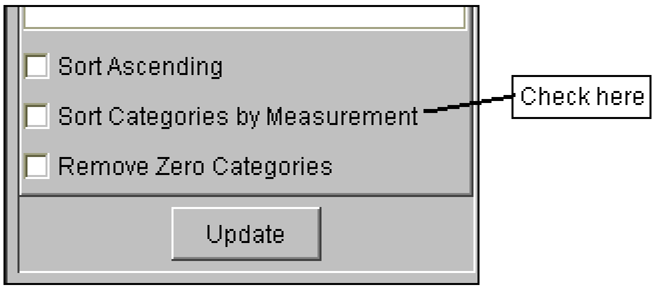
Sorting Categories By Measurement

Follow the steps below to sort your categories by their measurements:

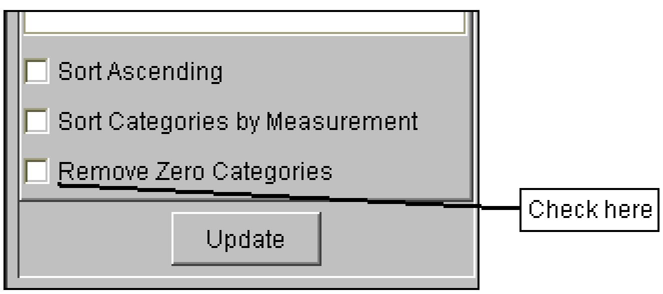
1. Click on the "Measurements" tab
2. Click on the boxes to the left of the desired measurement to select
3. Below the Measurement list, click on "Sort Categories by Measurements"



Removing Zero Categories

You may want to remove all of the categories that returned no numbers. To do this, follow the steps below:

1. Click on "Measurements" tab
2. Click on the boxes to the left of desired measurements to select
3. Below Measurement List, click on the "Remove Zero Categories" box

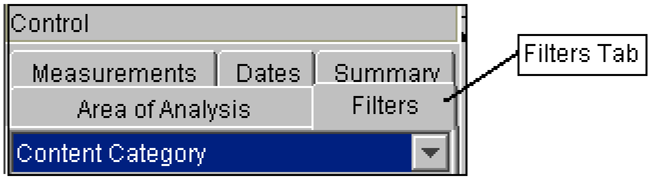


Choosing and Clearing Filters

Choosing Filters

Follow the steps below to choose your desired filters:

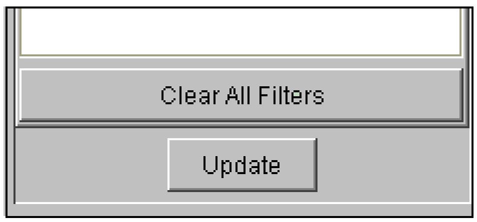
1. Click on the "Filters" tab
2. Select the desired filters



Clearing Filters

Follow the steps below to clear filters:

1. On the Control Pane, click on the "Filters" tab
2. Click on the "Clear All Filters" button

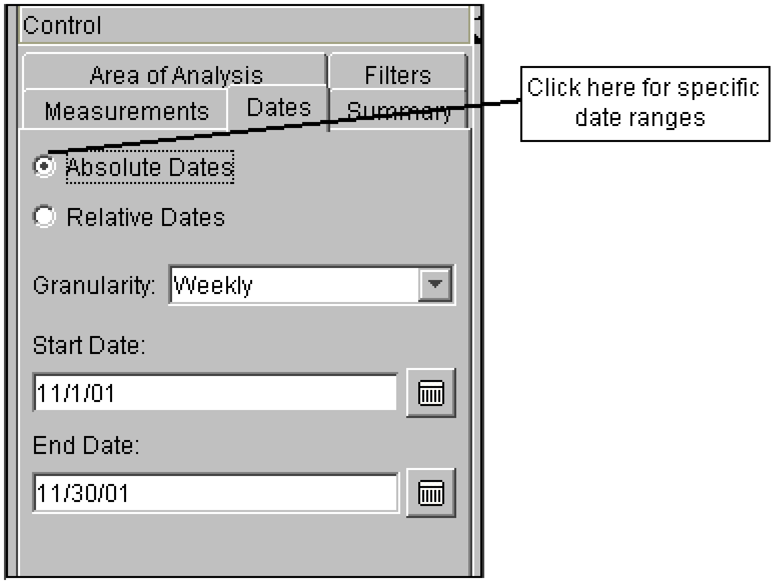


Setting Absolute and Relative Dates

Running a Data Analysis Using Specific Dates

You can select specific dates for the data you want to view. Follow the steps below to pick your dates:

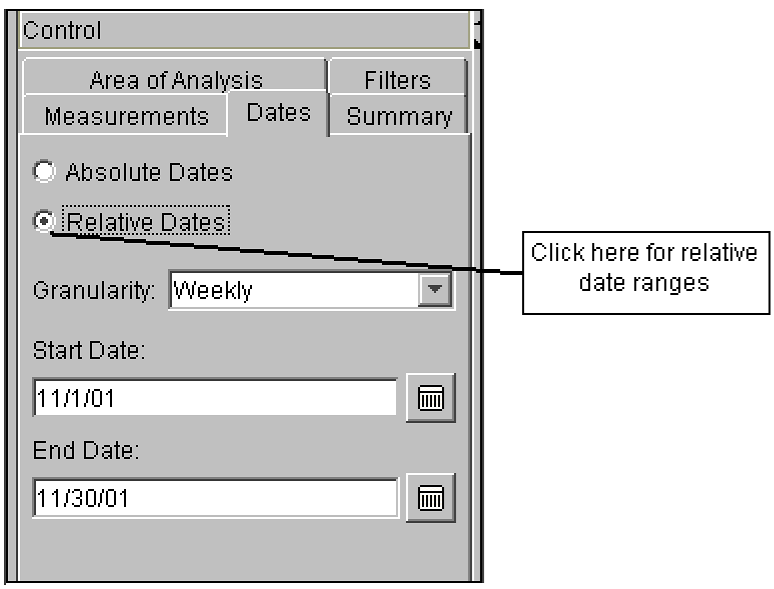
1. Click on the "Dates" tab
2. Click onthe "Absolute Dates" button
3. Click on the "Granularity" drop-down to choose Overall, Daily, Weekly, or Monthly
4. Click on the icon on far right beneath "Start Date" to see the calendar
5. Select the desired start date
6. Click on the icon on far right beneath "End Date" to see the calendar
7. Select the desired end date
8. Click on the "Update" button to display results



Running a Data Analysis Using Relative Dates

Follow the steps below to view your data using relative dates:

1. Click on the "Dates" tab
2. Click on the "Relative Dates" button to choose Daily, Weekly, or Monthly
3. Click on "Last" drop-down to choose the desired number and Days, Weeks, or Months. If desired, click on the box to choose Include Partial Months



Launching the Pathing Tool from Data Analysis

While in the Data Analysis window, you can launch the Pathing Tool. To do this,

1. Select either a resource or a category
2. Select "Tools" from the drop down at the top of the screen
3. Select "Data Panel"
4. Select "Path"

The Pathing Tool will be launched with the Anchor field filled in with your selection (category or resource) from Data Analysis. To fill in the rest of the fields, see Section 7, Analyzing Your Web Site Data Using the Pathing Tool.

Section 9. Working With Security Administration

The Security Administration feature gives you full control over who in your company can access your SurfAid results. In order to perform Security Administration, you must be authorized to do so. SurfAid recommends that only one person have access to this feature in order to avoid conflicts with changes. With Security Administration, you can do the following:

- Add, delete, or change users in your company at any time
- Allow different levels of access for your users
- Manage user access across multiple sites

Note: *The Security Administration with Multiple Sites uses the same process as The Security Administration does. The only difference is the unauthorized sites versus the authorized sites.*

Controlled access to data by users/roles/groups

In previous releases of SurfAid, access was defined strictly on a Web Site level. If a user had access to a Web Site, the user had access to all data in that Web Site. The access model in SurfAid allows both data and functionality access to be controlled. Security in SurfAid is based on three basic concepts:

- **Users**
  A user is identified by a distinct Security. This Security, along with a password, allows a user to log onto the SurfAid system. This Security is associated with a Web Site and a role and group (discussed below) for the Web Site. Note that some users can have access to multiple Web Sites, and each Web Site a user has access to can be associated with a different role and group.

- **Roles**
  A user's role specifies what functionality the user is allowed to access. The available roles are

  - **Normal User**
    A Normal User can access Standard Reports, Data Analysis, and Pathing. A Normal User cannot access any administrative functions such as the Category Editor and Security Admin.

  - **Reports User**
    A reports user can only access standard reports. No other functions are available to a Reports User.

  - **Administrator**
    An Administrator has full administrative access. An Administrator can access Standard Reports, Data Analysis, Pathing, the Category Editor, and Security Admin.

  - **Security Administrator**
    A Security Administrator has the same access as a Normal User with the addition of being able to access the Security Admin.

  - **Category Administrator**
    A Category Administrator has the same access as a Normal User with the addition of being able to access the Category Editor.

- **Groups**
  A group is made up of users with access to the same data. Groups can be added, modified and removed using the Security Admin GUI. The following settings are defined for each group:

  - **Areas of Analysis**
    Specifies which areas of analysis the users are permitted to see on the topsheet and in Data Analysis.

  - **Measurements**
    Specifies which measurements the users are permitted to see on the topsheet and in Data Analysis.

  - **Filters**
    Specifies implicit filters, (like those selected in Data Analysis) that will be applied to all queries the users perform on the topsheet and in Data Analysis. For example, users can be limited to data in a specific content category, or to data that matches a specific match string. Any filter (or combination of filters) that can be chosen in Data Analysis can be specified as an inherent group filter.

  - **Reports**
    Specifies which report folders are available for the users in the group. All files and sub-folders in the specified folders are available to users in the group. When a group is created, a Standard Report folder and a shared Exported Report folder are automatically created for the group. By default users in the group have access to only those folders. At the time of user login, after the authentication of the userid is complete, the user is assigned the Role and Group as specified by the Security Administrator for that Security. This assignment remains in place until the user logs off or is disconnected.

Accessing the Security Administration

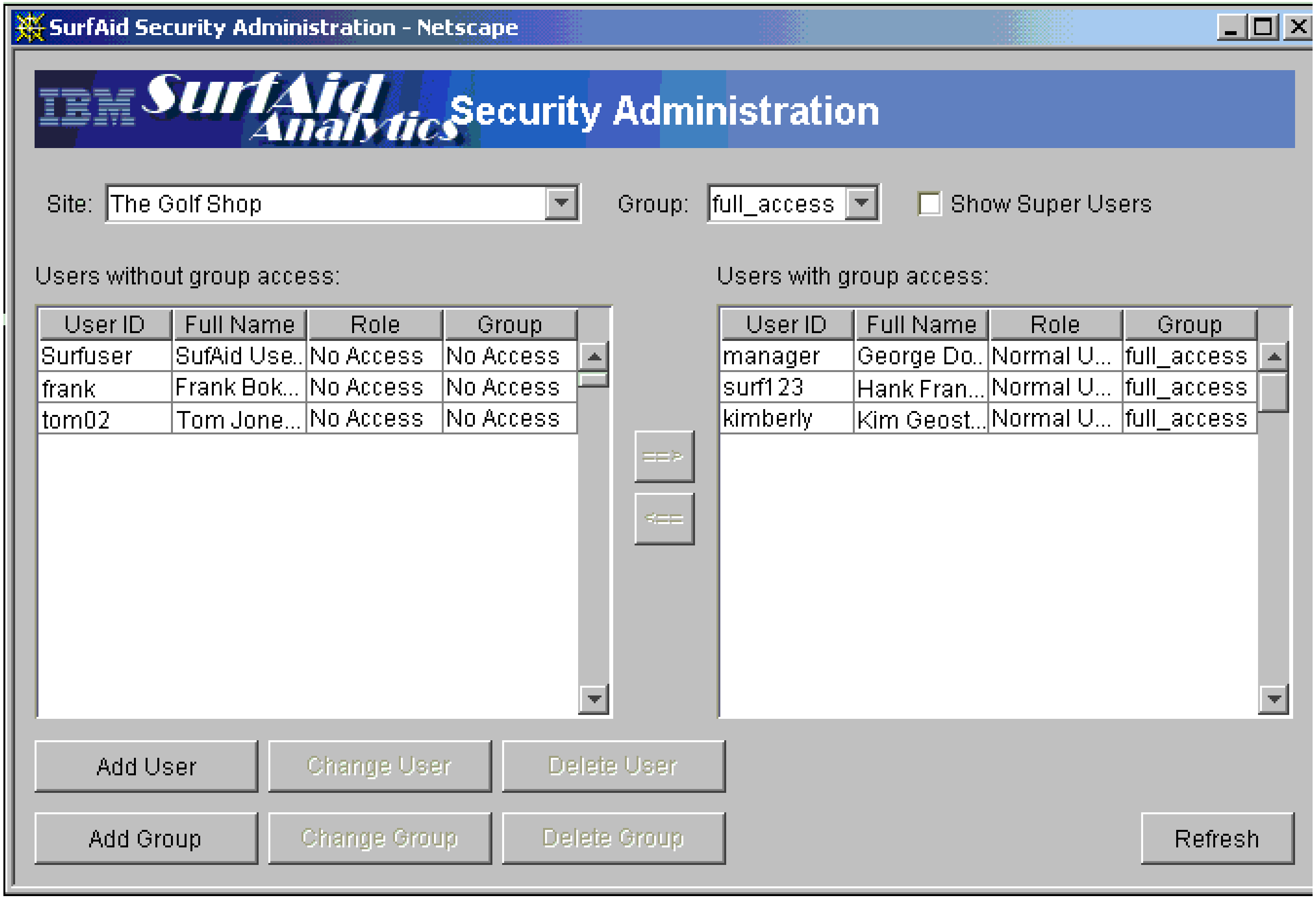
You can access the Security Administration from the main page:

1. Click on the "Main Page" button
2. Click on the "Security Admin" link

Note: *If you do not see the Security Admin link on the left pane, click on the Main Page button. If you still do not see the Security Admin link, then you do not have* *administrator authority.*

Viewing Your User Configuration Options

The figure below is an example of what you will see when you open the Security Administration window.



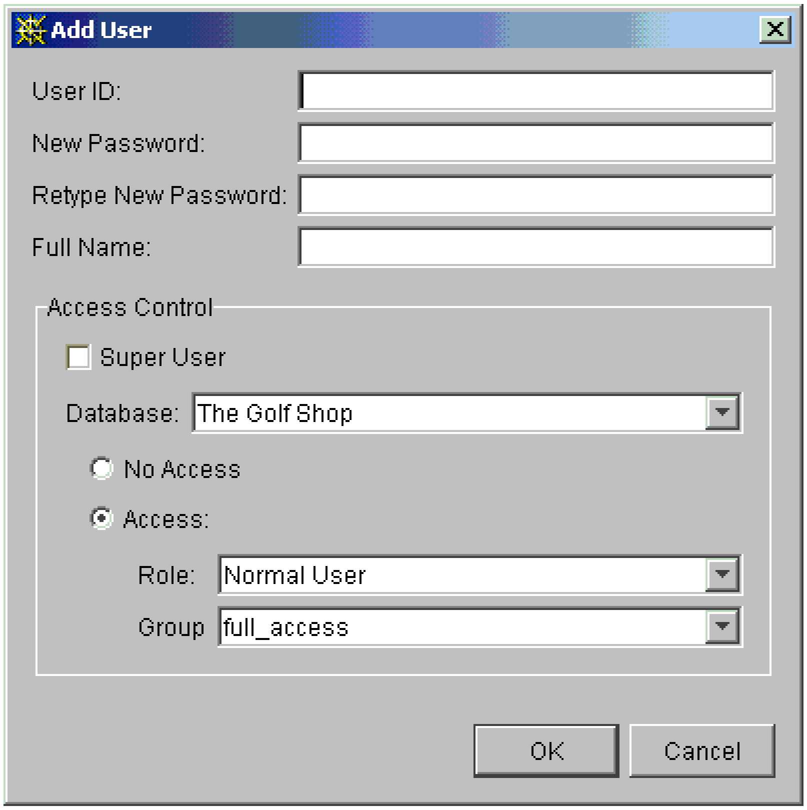
The table has one row of information for each user:

- The "Security " column contains user names.
- The "User Name" column contains the full name of the person.
- The "Access Level" column contains either "Admin" or "Non-Admin."

You can use the "Refresh" button to refresh the table with any updates that other administrators in your company have made.

Adding a New User

You can use the "Add User" button to add a new user to the table. Click on the "Add User" button at the bottom of the screen and you will see the dialog box shown in the figure below.



To add a new user,

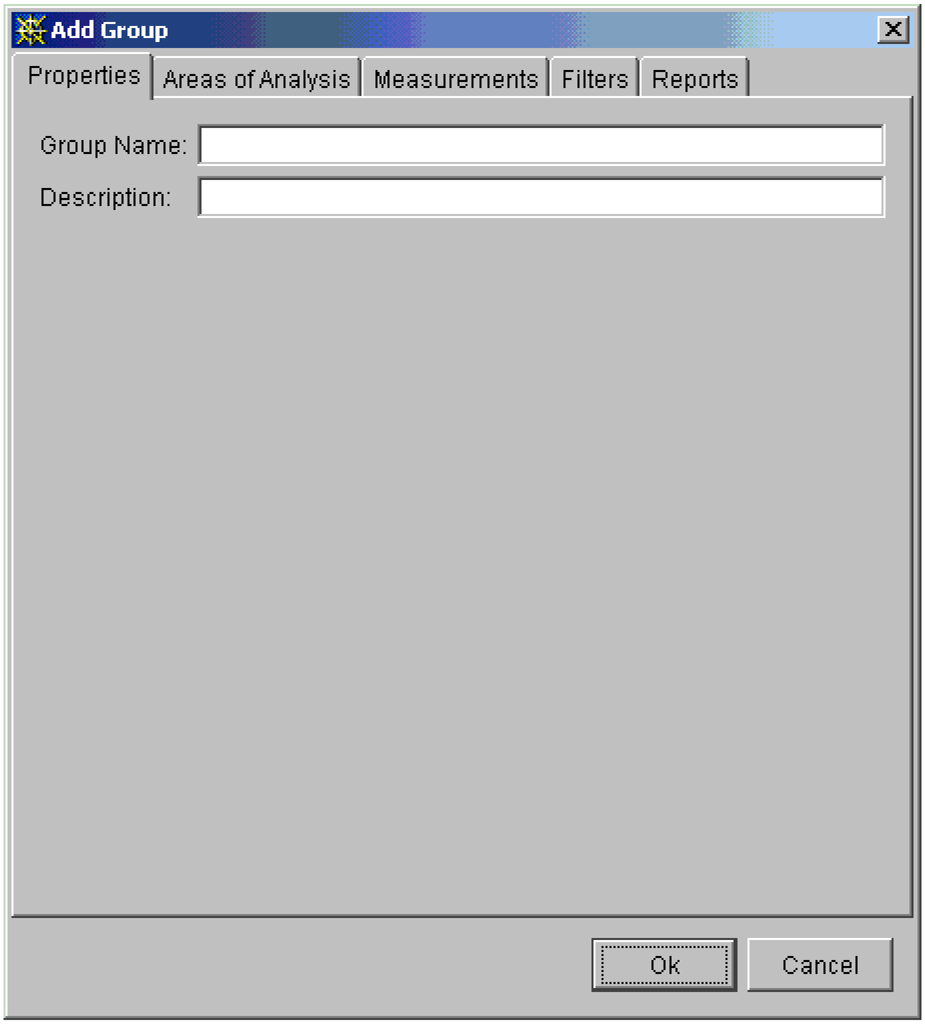
1. Type in the "User Name"
2. Type the password in twice

Note: *The password can only contain 8 characters and can only consist of letters, numbers, and the underscore character*

3. Click on the "OK" button

Adding a New Group

You can use the "Add Group" button to add a new group to the table. Click on the "Add group" button at the bottom of the screen and you will see the dialog box shown in the figure below.



To add a new group,

1. Type in the "Group Name" under the "Properties" tab
2. Type a description of the group

3. Click on the "OK" button

This will give the group access to the defaults areas of the website listed under each of the tabs. To change any of the default values, click on any of the tabs and change the value listed there.

Changing a User

To change a user,

1. Click on the user in the table
2. Click on the "Change User" button at the bottom of the screen
3. Make your changes and click on the "OK" button

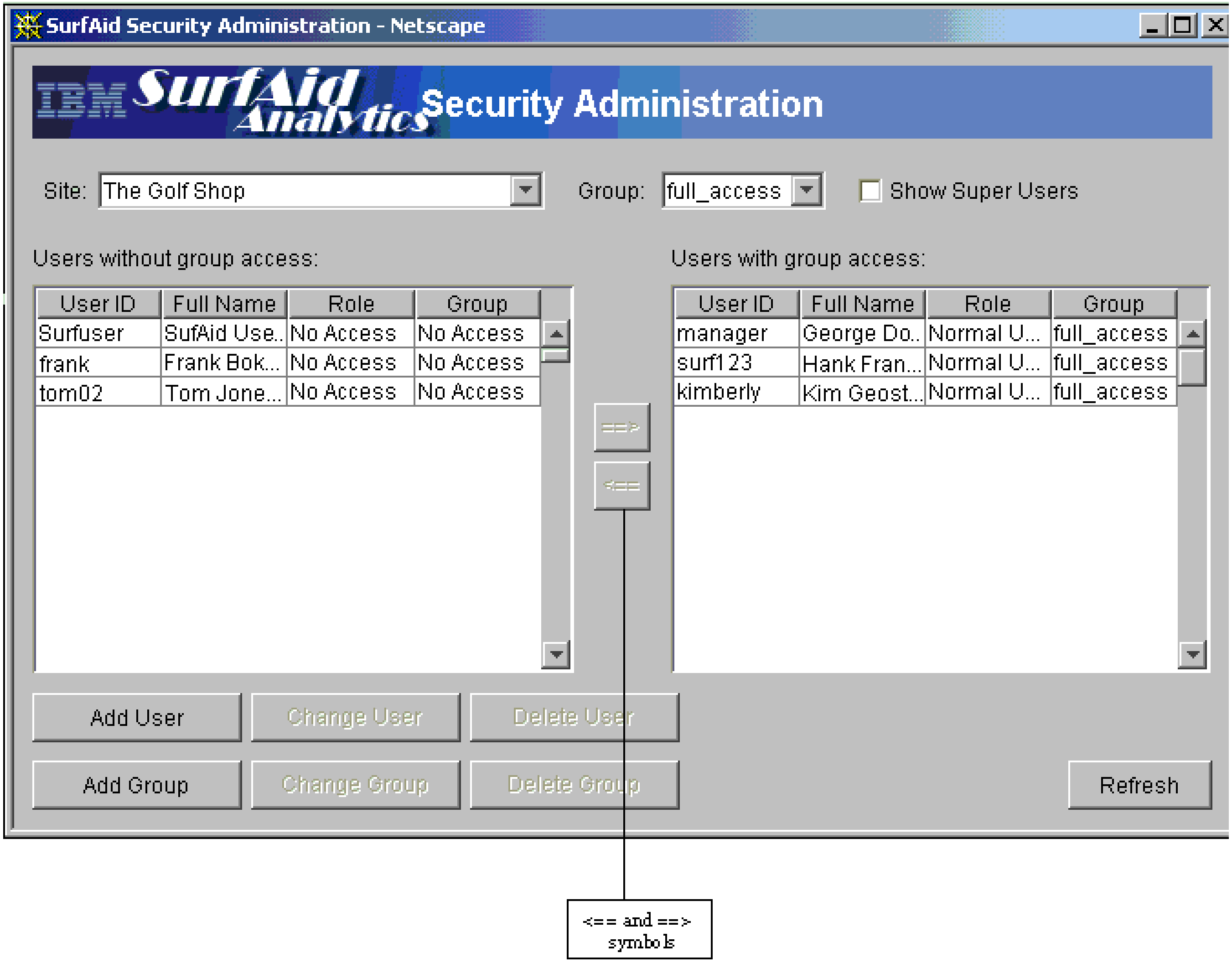
Deleting a User

To delete a user,

1. Click on the user in the table
2. Click on the "Delete User" button

Note: *You will not be able to delete yourself if you are the administrator.*

To authorize a user to a site, select the site name in the left list and click on the "==>" symbol between lists as shown in the figure below.
To remove authorization to a site, select the site name in the right list and click on the "<==" symbol.



Section 10. Working With the Category Editor

The "Category Editor" is designed to help you manage the way SurfAid categorizes your data. In order to perform categorization management, you must be authorized to do so. SurfAid recommends that only one person have access to this feature in order to avoid conflicts with changes.

The "Category Editor" is equipped with these main features:

- The ability to create a new category, rename a category, or delete a category.
- The ability to assign multiple URL matchstrings to a category.
- The ability to move a category from one location to another.

Note: *After you have made your category changes, it is necessary for your SurfAid consultant to schedule an update run. Please be sure to contact your consultant.*

Accessing the Category Editor

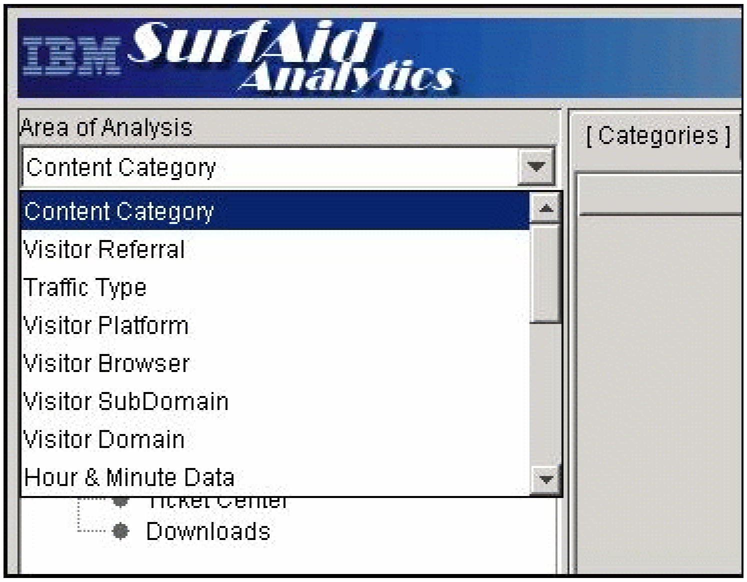
The "Category Editor" pictured in the figure below, is accessed from the Main Page by clicking on the "Category Editor" link in the left pane.

If the "Category Editor" link does not appear in the left pane, click on the Main Page. If the "Category Editor" still does not appear then you are not authorized to use this feature. A new browser window will be launched for you to perform other tasks.

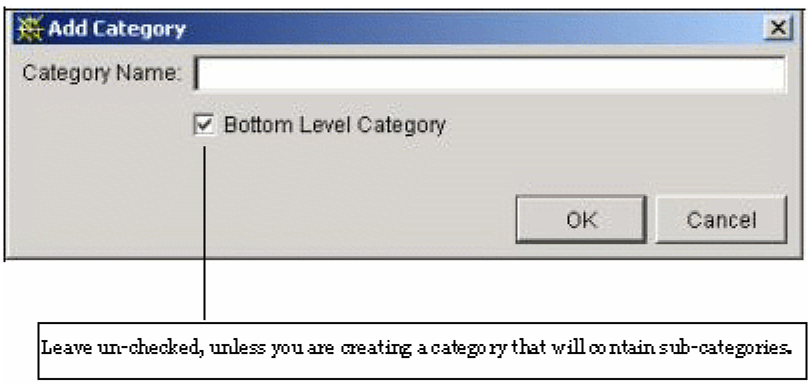
Creating a New Category

Occasionally you may need to add new categories and sub-categories when organizing your data.

1. Choose "Content Category", as shown in the figure below from the drop down box in the left pane, "Area of Analysis".



2. Decide where you would like to add your new category.
3. Click on the "Add Category" button on the lower right-side of the screen. The "Add Category" dialog box will appear as shown in the figure below.



4. Type in your category name if the new category will contain only resources, check the "BottomLevel Category" box.

Note: *If you are creating a category that will contain sub-categories, do not check this box.*

5. Click on the "OK" button to finish.

Renaming a Category

Follow these instructions to change the name of a category:

1. In the left "Area of Analysis" pane, select from the drop down box the "Area of Analysis" containing the category you wish to rename
2. Click on the category name that you want to change
3. Click the "Categories" tab in the right pane
4. In the right pane double click on the category name that you want to change
5. In the input area single click to position the cursor and make your changes
6. Click on the "Enter" key to finish the renaming process

Deleting a Category

To delete a category follow the steps below:

1. In the left pane, select from the "Area of Analysis" drop down box you wish to change
2. Click on the category containing the name you want to delete
3. Click on the "Categories" tab in the right pane
4. Single click in the right pane on the category name to be deleted
5. Click on the "Delete Category" button in the right corner of the screen to delete the category

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Assigning Matchstrings to a Category

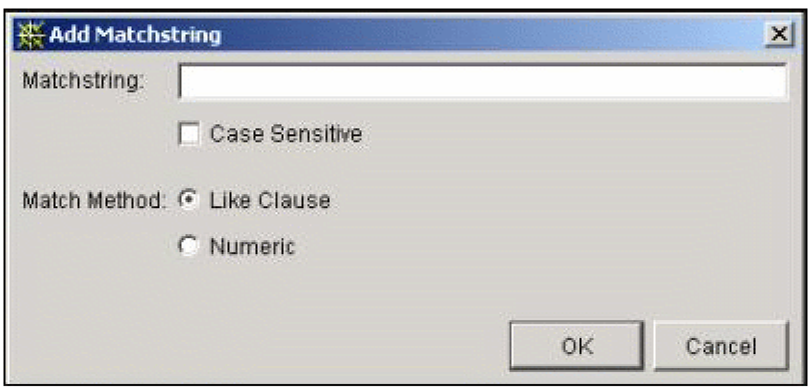
You must assign matchstrings to a category because the URLs are defined through a pattern matching process using a template with wild card characters. For instance, if you name your category "News" you might want to define a matchstring as "*news*", in which case all URLs containing "news" will be assigned to that category You can assign as many matchstrings as you like, but we recommend that you keep them as generic as possible.

Note: *To avoid creating new matchstrings when the year changes, do not use "*News/2000Jan*.html"*

*Instead try "*news/*.html"*

To assign matchstrings:

1. Select your category from the "Area of Analysis" in the left pane
2. Click on the "Matchstrings" tab in the right pane
3. Click on the "Add Matchstring" button and the dialog box shown in the figure below will appear

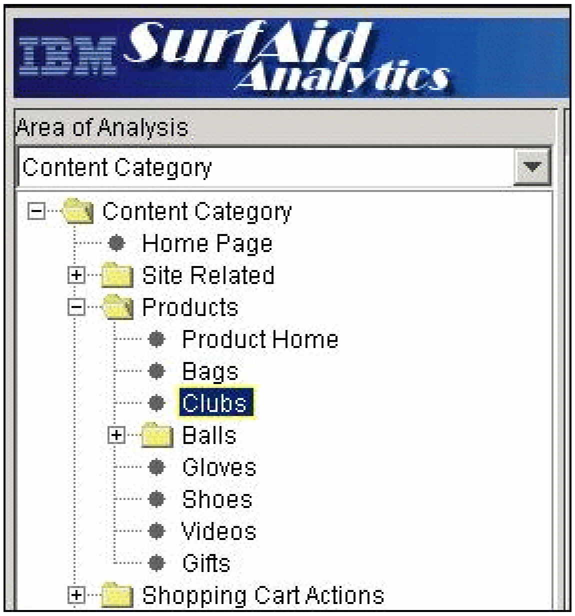


4. Type your matchstring in the space provided
5. Check the "Case Sensitive" box directly underneath the matchstring input area if the letter case is important
6. Select "Like Clause" for your "Match Method"
7. Click on the "OK" button. Your matchstring will then be added to the list
8. Repeat this process to add additional matchstrings to this category

Note: *A "Match Method" of "Numeric" is not used for standard URL.*

Mapping Objects to Matchstrings

In the example shown in the figure below, a new category has been added to the sub-category "Products" called "Clubs" with the matchstring "*Clubs*."



1. With the matchstring selected, click on the "Map Objects to Matchstring" button. The "Map Objects to Matchstring" dialog box will appear as shown in the figure below.

2. To move the resources out of "Uncategorized," check the "Map Currently Uncategorized Objects" box. If you want resources corresponding to the matchstring in all categories moved to your new category, check the "Map All Objects" box.
3. Click on the "OK" button.

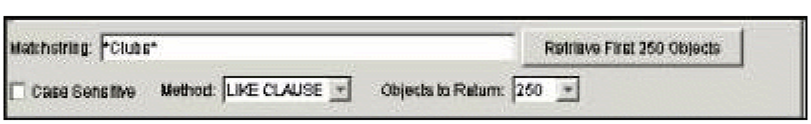
Note: *You can also select multiple matchstrings by holding down the Ctrl key on your keyboard and selecting the matchstrings.*

Moving Resources Into a Category

Once you have created a category, you will probably want to move any existing resources into that new category. You may also need to move the resources out of the existing category and into the new one. Resources can be moved either through the "Map Objects to Matchstring" dialog box or by "drag and drop" method.

Another way to move resources is to drag and drop individual resources into your newly created folder. Do this:

1. Click on the category containing the resources you want to move in the "Area of Analysis" pane.
2. Click on the "Objects" tabs. At the bottom of the window you will see the input area for a matchstring as illustrated in the figure below.



3. Type in the matchstring that will map the resources you want to move out of this category.
4. Select the appropriate options below it and then click on the "Retrieve First 250 Objects" button. If there are resources in the category which correspond to your matchstring, the first 250 of them will be displayed under the "Object" column.
5. Select one or more of the resources and drag them over to the category where you want them placed.
    - ✍ To select more than one resource, left click on the first one and hold the shift key down. Use the arrow down button to select additional resources.
    - ✍ To de-selected a resource, hold down the control key (Ctrl) and left click the mouse button.
    - ✍ Select all resources from the first one chosen to the end of the list by holding down the shift key and the control (Ctrl) at the same time, and then pressing the (End) key.

Moving a Category

You may find that within a category the structure is different from what you would like. For example, suppose you have the category structure listed below and you want to move "International" ahead of "Local"

News
Local
National
International
Business
Stocks
Economic News

You can move a category within its own level by following these steps:

1. In the left pane, select from the drop down box the "Area of Analysis" you wish to change
2. click on the category you want to move
3. Click the "Categories" tab in the right pane
4. Single click on the category name that you want to move
5. Drag the category name to the "Area of Analysis" left pane
6. Position it on the new target category name by holding the left mouse button down on the name and moving it over to the left pane area

---

Changing a Matchstring

To change a matchstring follow the steps below:

1. In the left pane, select from the drop down box the "Area of Analysis" you wish to change
2. Click on the category that contains the matchstring that you want to change. You may have to open up several categories to find the one you want

    Note: *You can always select the highest level category (e.g. "Content Category") and search the list in the right pane.*

3. Select the "Matchstrings" tab in the right pane to see the list of matchstrings for this category
4. Double click on the item you want to change and make your changes
5. Select from the drop down box the match method
6. Select from the drop down box the case sensitivity
7. Click the "Enter" key to confirm your changes

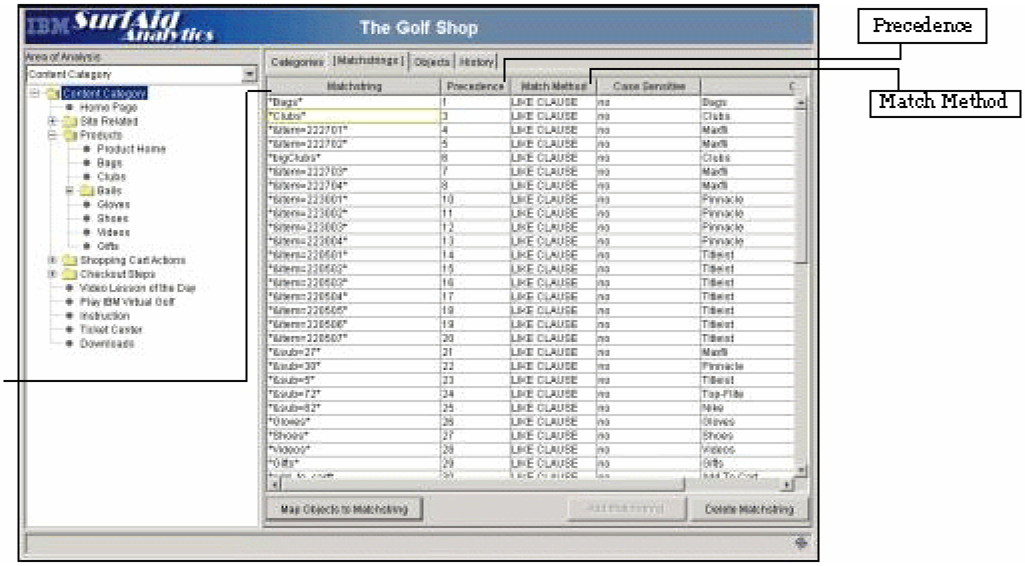
Changing the Matchstring Precedence Order

Follow these steps to change the matchstring precedence order:

1. In the left pane, select from the drop down box the "Area of Analysis" you wish to change.

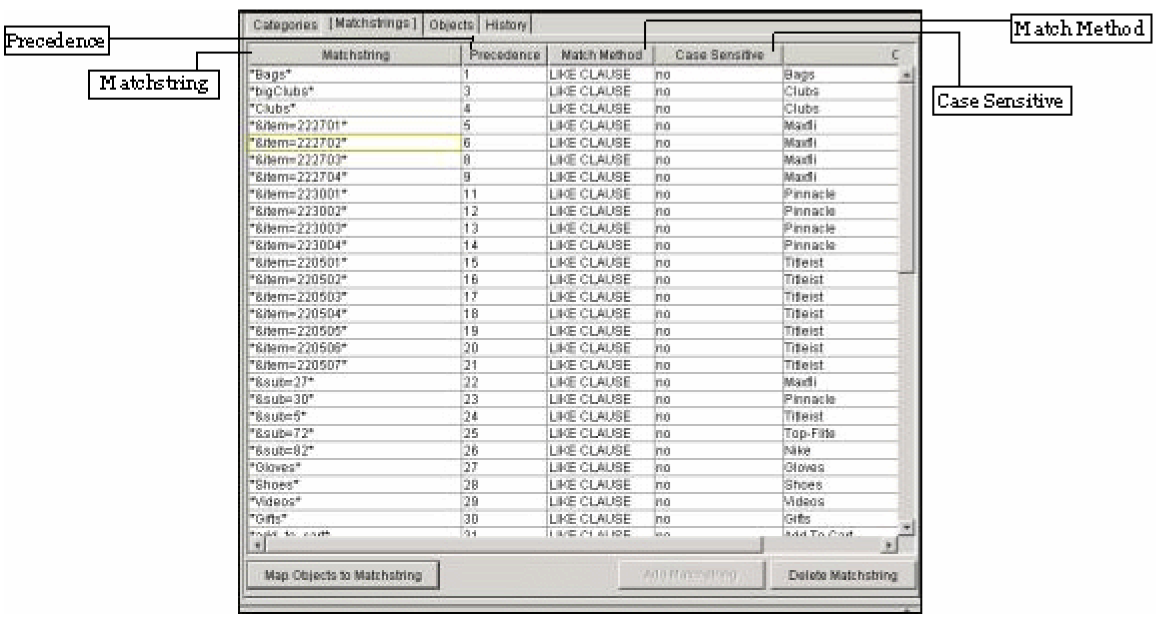
2. Select from the lowest level category that contains all matchstrings related to the one that you want to move. If you are unsure, select the highest level category (e.g. "Content Category").
3. Select the "Matchstrings" tab in the right pane.

   The figure below shows that the matchstring "*bigClubs*" should be placed before "*Clubs*":



4. Drag the matchstring up or down on the screen until it is in the right location. Do this by holding the left mouse button down on the matchstring, moving it up or down the list, and then releasing the button where you want the matchstring to appear.

   The matchstring is now located in the correct place in the table:



Note: *Move the matchstring to the bottom of the list by moving it as far down as possible (second from bottom), then move the last matchstring in the list up one position.*

Deleting a Matchstring

To delete a matchstring follow the steps below:

1. In the left pane, select from the drop down box the "Area of Analysis" you are interested in.
2. Select from the presented list of categories, the category that contains the matchstring that you want to delete. You may have to open up several categories to find the one you want.

Note: *You can always select the highest level category (e.g. "Content Category") if you don't mind searching the list in the right pane.*

3. Select the "Matchstrings" tab in the right pane and you will see the list of matchstrings for this category.
4. For the matchstring of interest, single click on it and then click on the "Delete Matchstring" button.

Refreshing the Display

If you have more than one administrator performing category administration, there is a chance that your display will not reflect the most recent changes made to your SurfAid site. To view the most recent changes, refresh the display from the SurfAid categories by clicking on the button in the lower right portion of the window.

Section 11. Working With the File Administration

The "File Administrator" is designed to help you manage your files in SurfAid. In order to perform file management, you must be authorized to do so. SurfAid recommends that only one person have access to this feature in order to avoid conflicts with changes.

The "File Administrator" is equipped with these main features:

- The ablility to create a new file
- The ablility to delete a file
- The ablility to move a file
- The ablility to rename a file

Creating a New Folder

To create a new folder,

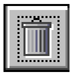
1. Click on the new folder button at the top of the screen

2. Type in a name for the folder
3. CLick "OK"

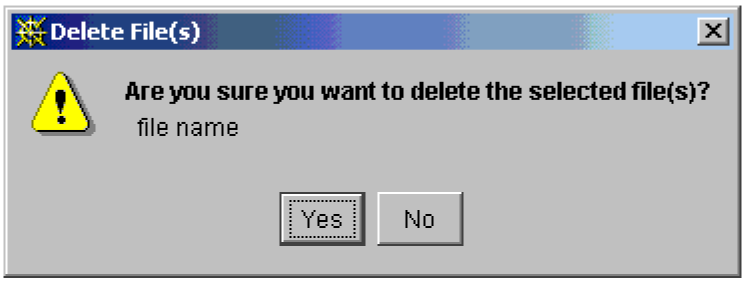
Deleting a Folder or File

To delete a folder or file,

1. Select the desired folder or file to be deleted by clicking on it
2. Click on the delete button at the top of the screen



3. Select "Yes"

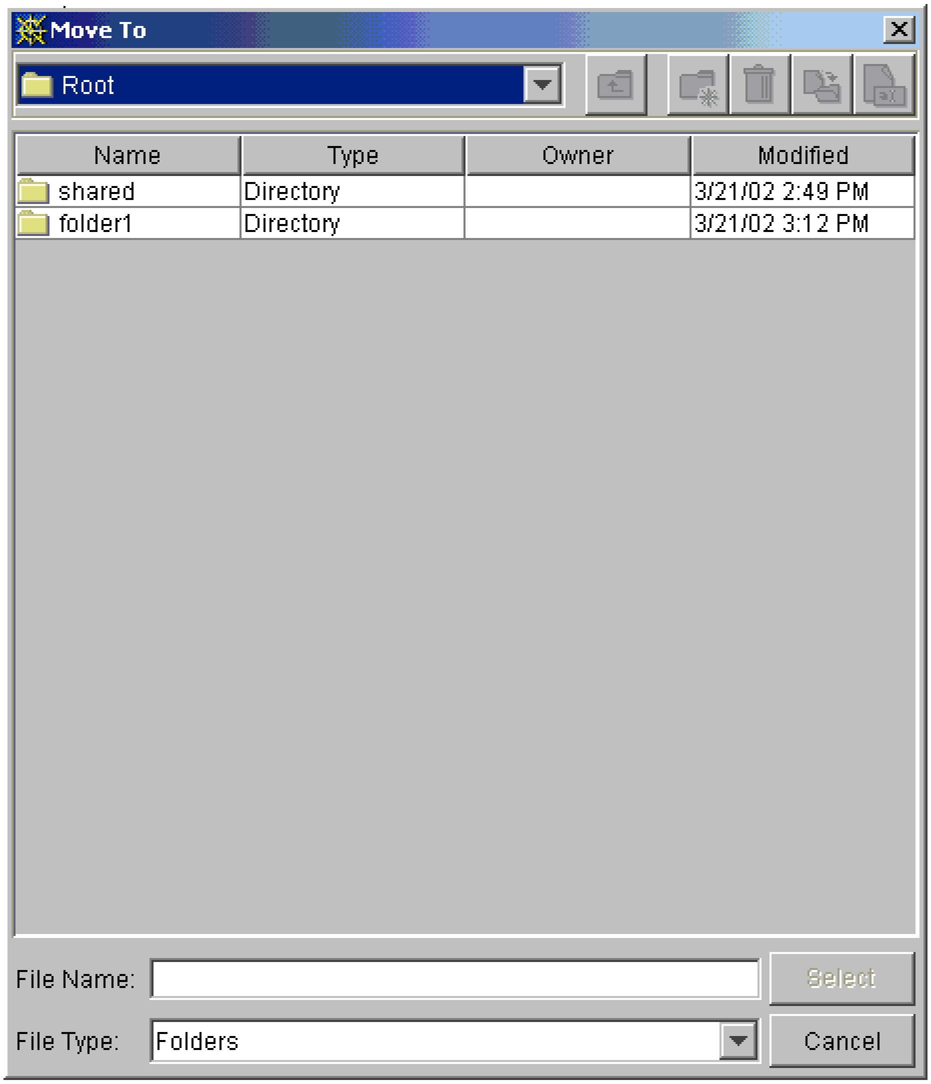


Moving a File

To move a file,

1. Select the desired folder or file to be deleted by clicking on it
2. Click on the Move To button at the top of the screen

3. Select a folder to place the file in from the dialog box



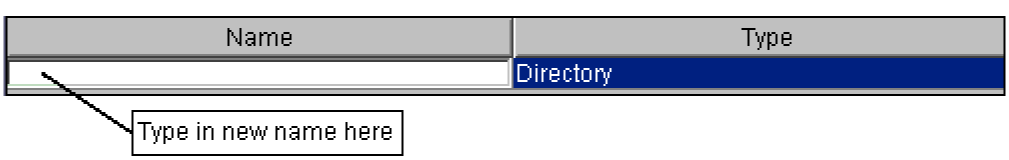
4. Click "Select"

Renaming a Folder or File

To rename a file,

1. Select the desired folder or file to be deleted by clicking on it
2. Click on the rename button at the top of the screen

3. Type in the new name for the folder or file



4. Click "Select"

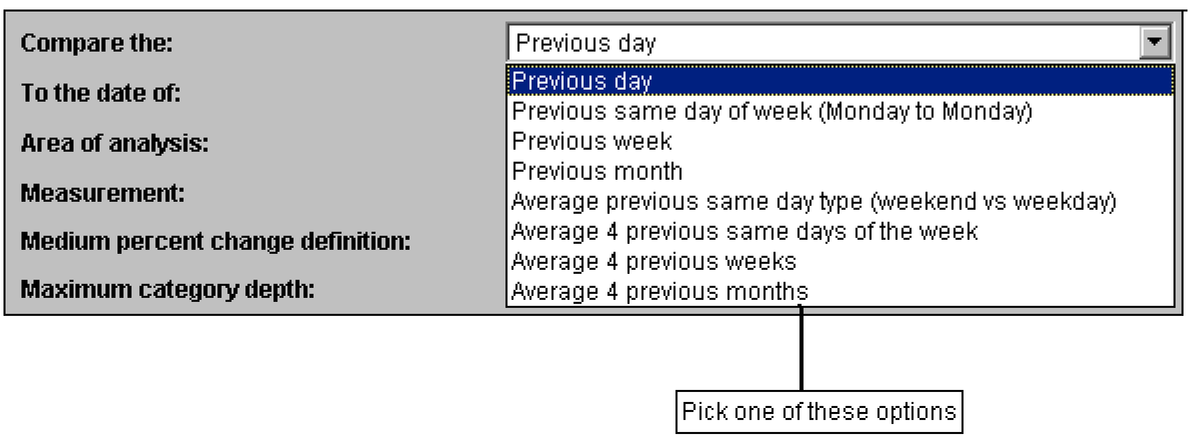
Section 12. Working With the Comparison Feature

The "Comparisons" feature allows you to compare days, weeks and months with a day of your choice. The dynamic comparison allows you to display tailoring capabilities and is displayed in its own window (allowing multiple comparisons to be displayed at the same time). The report is easily downloaded to Excel in addition to displaying within the Internet Explorer embedded version of Excel. The Dynamic Category Comparisons feature can be accessed by clicking on the "Comparisons" link in the left navigation panel of the Main Page.

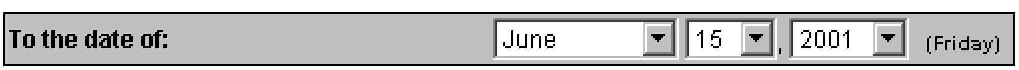
Building a Comparison

To build a comparison you can either leave the default entries or select your own. Follow the instructions below to choose your own entries:

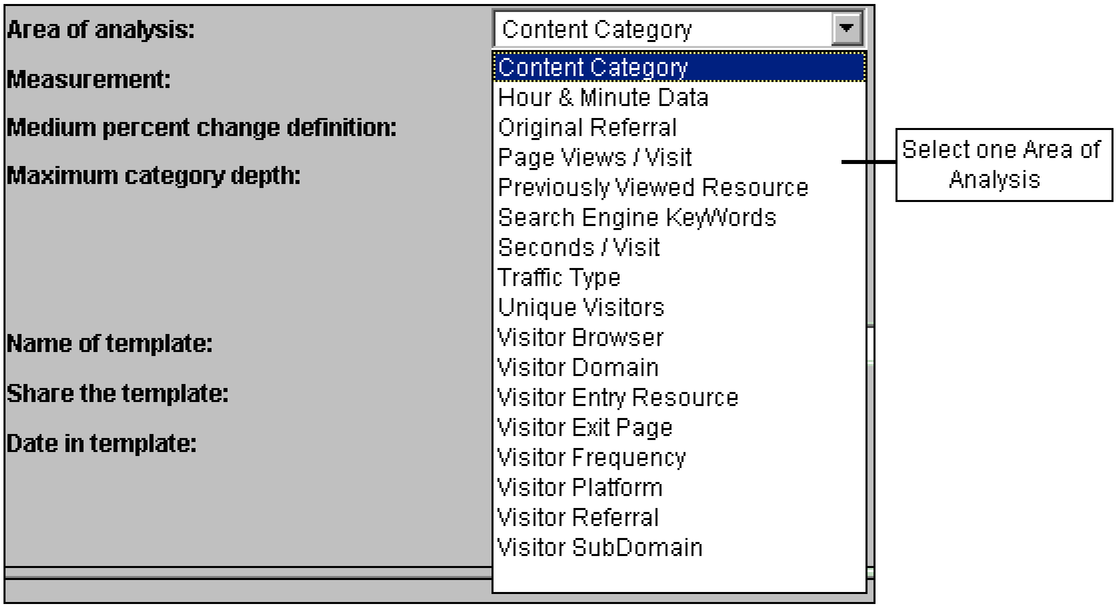
1. Click on the arrow button to show a drop-down list of options for the day(s), week(s), and months(s) to compare to a day of your choice



2. Select a day to compare your above selection with



3. Select an Area of Analysis you want for your comparison



4. Select a Measurement for your Area of Analysis

5. Select two percentages to represent what you consider to be a medium amount of change in numbers. When the comparison is displayed, entries in the comparison are color coded to indicate the percent of change the comparison shows. The percent of change is grouped into small, medium, or large groups. Changes less than your medium range are considered to be a small amount of change. Changes greater than your medium range are considered to be a large amount of change

6. Select a number from 1 to 99 to represent the number of category levels to display. Most categories will not go to 99

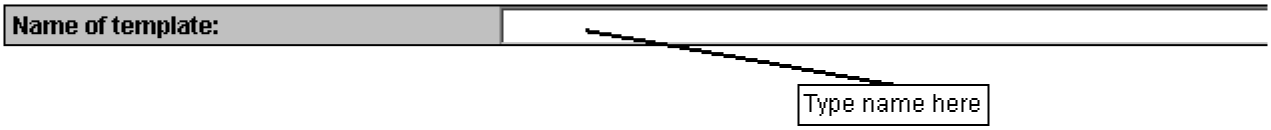
7. Click the "View the results" button to launch another window with your results

Note: *At any time you can click on the for additional help*

Saving a Comparison

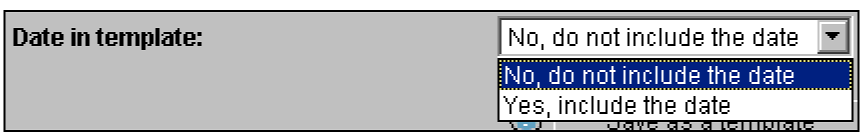
To save a comparison,

1. Select a name for the report you want to save



2. Select "Yes" or "No" to share the report with others

3. Select "Yes, include the date" or "No, do not include the date" to save the current date in the report. If you decide to save the date, the next time you look a the report the date the report was saved will be used as the comparison date. If you decide not to save the date, the next time you view the report, the current date will be used as your comparison date.



4. Click on the "Save as template" button to save the report template

Note: *At any time you can click on the for additional help*

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